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MONTHLY STATISTICAL SUMMARY

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Current Trends: Production Still Climbing

Preliminary data indicate that production of paper and paperboard in September was at a seasonally adjusted rate of 66.0 million tons per year. This brought the third quarter rate to a record 65.2 million tons per year, up slightly from the 64.9 million tons reached in the second quarter of the year, and 1.3 million tons per year over the first quarter. If production maintains its third quarter 1979 rate for the remainder of the year (and data for production of paper and paperboard in early October show continued strength), total production for the year would reach 64.8 million tons, some 5% above the 61.6 million tons produced in 1978, establishing the 1979 production total as a new high.

There is, of course, considerable concern that total economic activity is on the threshhold of a cyclical deline. Recent moves by the Federal Reserve Board to tighten reserves have pushed the discount rate and the prime rate to record highs and sent tremors through Wall Street. Memories of the sharp drop in paper and board production in the last two months of 1974 are stark reminders of the dangers of simple extrapolation of current trends to estimate an annual total. However, in contrast

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to that earlier period, inventories of paper and paperboard products in the channels of distribution are still not excessive in relation to consumption. They may become moderately excessive in the fourth quarter of the year.

Where domestic production is pointing to a gain of better than 5% over year-ago levels for 1979, barring any sharp year-end decline, the new supply total is estimated at 70.5 million tons, 4.6% over 1978's 67.39 million tons. The difference in the two growth patterns reflects a reduction of imports of newsprint from Canada, in part, the result of supply difficulties. In fact, even now inventories of newsprint at publishers appear somewhat below desired levels.

The available data on inventories indicates a wide variety of positions. Data on inventories at pulp, paper and board mills show these to be at relatively low levels. The Industry Data Sheet shows that Department of Commerce data on January-August dollar sales of pulp, paper and paperboard companies was up 18.4% with inventories at these companies up only 6.8%. API data show tonnage inventories of containerboard at paperboard mills as of September 1, 1979 at a relatively low 0.3 weeks of supply, compared to 0.5 weeks a year earlier. Inventories at white paper mills at the end of August 1979 were 8% below year-ago levels and equivalent to about 1.7 week's supply. These three categories - newsprint, other printing/writing papers and containerboard - account for over 60% of the total new supply of paper and paperboard.

There are, of course, instances where individual consuming groups have increased their inventories significantly and, in some cases, have exceeded the level supportable by their activity. Also, there was some increase in containerboard inventories at box plants, but the September 1, 1979 figure indicates that total inventories at containerboard and box plants combined, amounted to a relatively low 5.6 weeks of consumption.

The strength in production of paper and board in the third quarter of 1979 is in sharp contrast with the lower year-ago levels, when most of the West Coast mills were on strike. For this reason the current trends are better determined by analysis of seasonally adjusted data during the course of 1979, than by comparisons of year-to-date totals. From any

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

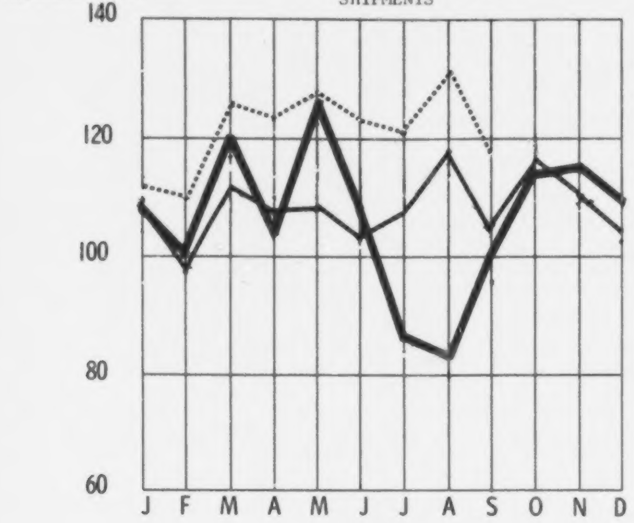
PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

	YEAR		JUNE	JULY	AUG.	SEPT	Annual Rate Y-T-D	% Change from same Period Last Year
	1977	1978	1979	1979	1979	1979	1979	
PAPER					R	P		
Newsprint - Production	3870	3768	340	335	360	365	4056	8.2
- Shipments	3866	3779	338	337	358	365	4055	8.0
Printing & Writing	13865	14545	1301	1218	1376	1249	15370	5.8
Groundwood Paper - Shipments	1331	1309	124	121	131	117	1457	13.3
- New Orders	1336	1367	126	130	135	124	1492	7.0
- Unfilled Orders	137	179	181	195	195	204	204	2.0
Coated Paper - Shipments	4261	4448	352	360	403	373	4486	0.6
- New Orders	4279	4428	337	394	397	354	4508	1.3
- Unfilled Orders	398	404	410	464	445	429	429	4.6
Unctd Free Sheet - Shipments	6777	7225	686	616	696	627	7802	7.9
- New Orders	6833	7542	674	635	694	619	7832	1.7
- Unfilled Orders	436	754	724	777	752	737	737	-8.2
Thin Paper - Production *	362	354	32	29	35	32	385	8.9
Cotton Fiber Paper - Shipments	108	114	10	9	11	11	125	10.5
Bleached Bristols -Production*	1026	1095	97	83	100	88	1115	2.2
Tissue Paper - Production	4286	4215	387	372	400	375	4562	7.5
Total Packaging & Other Paper	5390	5325	493	461	492	480	5764	6.3
Unbl. Kraft Paper - Shipments	3815	3894	339	321	337	330	3997	0.7
Other Paper - Production * #	1575	1430	154	140	155	150	1767	21.9
TOTAL PAPER-Production-Unadj.	27411	27852	2521	2386	2628	2469	29751	6.5
-Production-S.A.			2541	2514	2559	2556	29788	6.5
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	21636	22790	2048	1922	2081	1935	23944	4.2
Unbleached Kraft Linerboard	12573	13228	1201	1123	1233	1142	13941	4.9
Production for Export	1290	1466	150	125	142	126	1564	5.2
Other Unbl. Kraft Paperboard	1078	1145	104	95	101	89	1251	2.7
Semichemical Paperboard	4264	4439	406	380	406	387	4728	6.7
Production for Export	122	119	9	10	9	6	98	-17.7
Solid Bleached Paperboard	3721	3979	337	324	340	318	4023	-0.4
Production for Export	389	430	41	30	38	33	435	-1.3
Recycled Paperboard	7317	7485	636	562	670	622	7654	2.3
Production for Export	30	22	1	2	2	1	19	-18.1
TOTAL PAPERBOARD-Prod.-Unadj.	28953	30275	2684	2484	2750	2558	31597	3.7
- Production - S.A.			2678	2582	2590	2670	31383	3.8
- New Orders	29022	31194	2674	2685	2774	2555	32440	2.3
- Unfilled Orders	1037	1370	1493	1625	1589	1622	1622	5.7
WET MACHINE BOARD *	128	142	15	11	14	14	166	16.1
BUILDING PAPERS *	1850	1956	170	147	165	160	1931	-1.9
INSULATING BOARD *	1435	1417	122	107	120	105	1413	1.5
TOTAL ALL GRADES - Unadjusted	59778	61642	5510	5134	5677	5305	64859	4.8
- Production - S.A.			5513	5365	5429	5503	64659	4.8
HARD PRESSED BD. [not in total]*	2237	2180	169	188	195	175	2144	-3.4

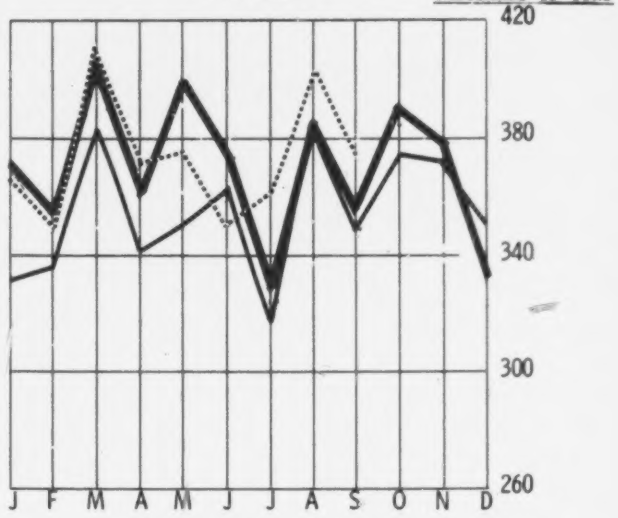
* Census Data - Production. Last two months estimated.
# Production excludes API bleached kraft envelope.
## Includes revisions not available monthly.

S.A. Seasonally Adjusted
P Preliminary
R Revised



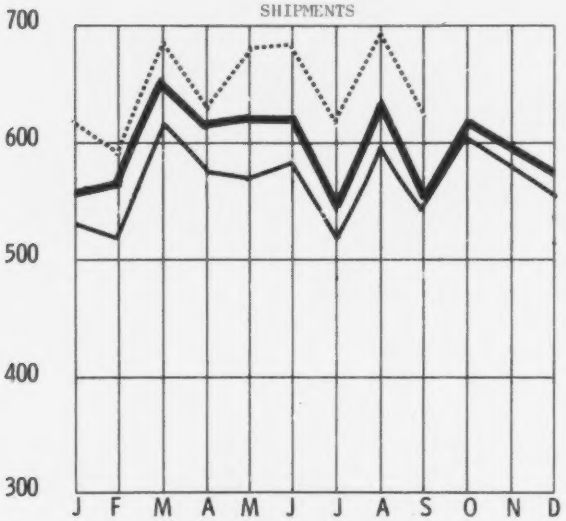
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



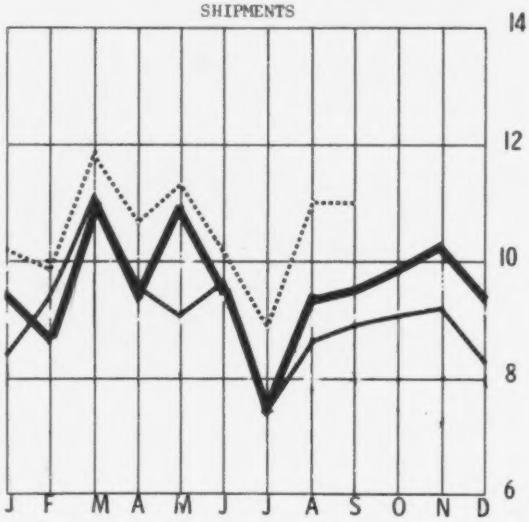
COATED PAPER

SHIPMENTS



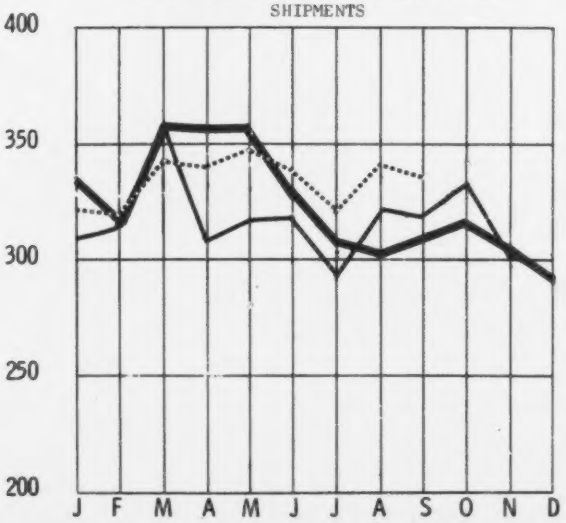
UNCOATED FREE SHEET PAPERS

SHIPMENTS



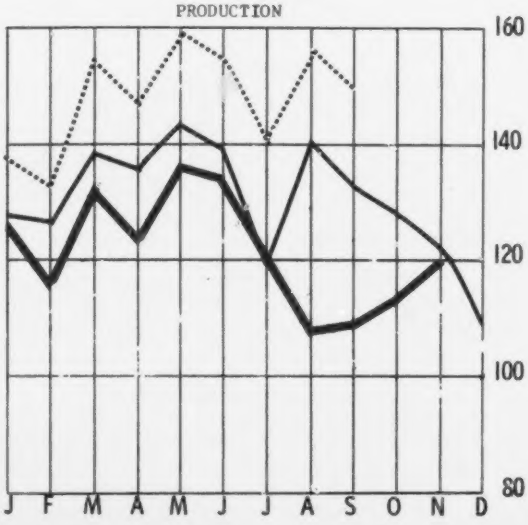
COTTON FIBER PAPER

SHIPMENTS



UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION

1977 —— 1978 ▬▬ 1979 ………

WOOD PULP STATISTICS

(Thousands of Tons)

	YEAR		MAY	JUNE	JULY	AUG.	Annual Rate Y-T-D	% Change from same Period Last Year
	1977	1978	1979	1979	1979	1979	1979	
TOTAL WOOD PULP (1)					R	P		
Total Wood Pulp - Production	46652	47662	4369	4321	4092	4415	50179	4.6
- Imports	3864	4025	456	347	352	378	4385	11.2
- Exports	2640	2599	224	310	279	247	2775	8.2
- New Supply	47877	49088	4600	4357	4165	4546	51788	4.9
Dissolving Pulp - Production	1467	1411	139	136	125	155	1490	-1.7
- Imports	181	189	8	7	10	19	177	5.5
- Exports	796	758	47	83	88	71	743	-5.9
- New Supply	852	842	101	60	47	103	924	3.4
Paper Grades Chemical Pulp - Production	36897	37847	3405	3369	3189	3431	39504	3.7
- Imports	3481	3627	411	332	326	331	3992	11.6
- Exports	1763	1780	173	217	187	171	1974	15.3
- New Supply	38615	39694	3644	3484	3327	3591	41522	3.9
Groundwood and Thermo-Mech. - Production	4403	4373	384	369	360	387	4463	2.7
- Imports	203	208	36	8	16	27	215	8.9
- Exports	81	62	5	9	4	4	59	-9.3
- New Supply	4525	4519	415	368	371	410	4620	3.1
Semi-Chemical - Production	3886	4031	441	446	419	441	4722	17.6
- Imports	0	0						
- Exports	0	0	------	Included	with	Groundwood	Pulp	------
- New Supply	3886	4031	441	446	419	441	4722	17.6
MARKET WOOD PULP								
Total Market Wood Pulp - Production	4819	5165	513	501	487	514	5571	5.6
- Imports	2684	2816	260	262	247	240	3105	11.7
- Exports	2359	2480	199	312	243	238	2632	7.6
- New Supply	5144	5501	573	451	491	516	6044	7.8
Dissolving Pulp - Production	1465	1406	139	136	125	155	1491	-1.3
- Imports	256	291	27	20	19	29	335	21.4
- Exports	798	824	67	111	65	93	834	-0.9
- New Supply	923	873	98	44	79	91	992	4.9
Paper Grades Chemical Pulp - Production	3263	3675	367	360	357	352	4023	9.3
- Imports	2394	2495	233	242	228	210	2764	11.7
- Exports	1515	1613	128	194	175	141	1751	12.3
- New Supply	4143	4557	472	408	409	422	5036	9.6
Groundwood Pulp and All Other - Production	90	83	7	6	5	6	56	-31.7
- Imports	35	26	0	1	1	1	7	-73.2
- Exports	46	42	4	7	3	4	47	7.6
- New Supply	80	67	3	0	3	3	16	-75.1

(1) Production excludes defibrated, exploded & screenings: 1977 - 3,218,000 tons; 1978 - 3,155,000

SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

FIBROUS RAW MATERIALS

(Thousands of tons)

CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	62399	64044	5876	5654	5313	5464	66308	3.2
Total Wood Pulp (2) A	47596	48777	4525	4344	4146	4114	50682	3.6
Market Wood Pulp A	4216	4774	433	426	413	440	5115	7.3
Waste Paper (3) A	14058	14601	1296	1254	1122	1295	14969	2.2
Rags, Straw & Other C, E	745	666	55	55	45	55	657	-1.6
INVENTORIES								
Wood Pulp at Pulp Mills A	193	130	122	124	118	124	124	-21.1
Market Pulp at Pulp Mills A	277	187	201	165	178	145	145	-40.8
Mkt Pulp at Ppr.& Bd. Mills CE	404	435	434	452	448	445	445	2.1
Waste Ppr.at Ppr.&Bd. Mills CE	728	740	668	666	656	645	645	-11.9
Rags, Straw and Other at Paper and Board Mills C, E	67	66	79	79	82	82	82	20.6
Mkt Wood Pulp Days of Supply A	55	44	42	41	38	39	39	-23.3
Wood Pulp Consumption at at Non-Paper Mills C, E	876	884	80	72	76	75	915	5.3

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API

P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons

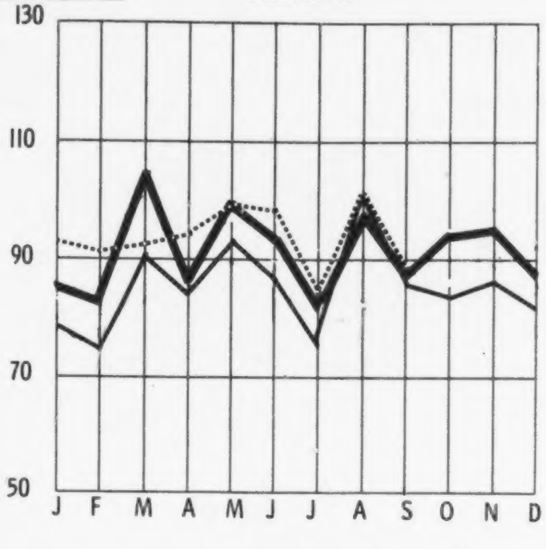
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.: 1977 - 1,688,000; 1978 - 1,655,000 ton

(3) Census Waste Paper Consumption: 1976 - 11,873,645 tons; 1977 - 12,192,000 tons; 1978 - 13,185,000 tons

THOUSANDS OF TONS

BLEACHED BRISTOLS

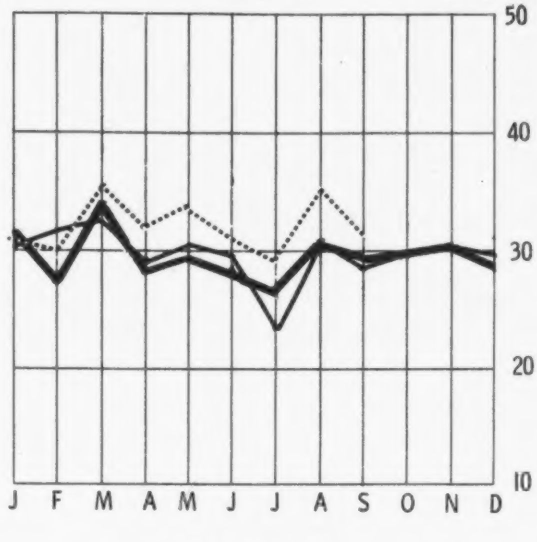
PRODUCTION



THIN PAPERS

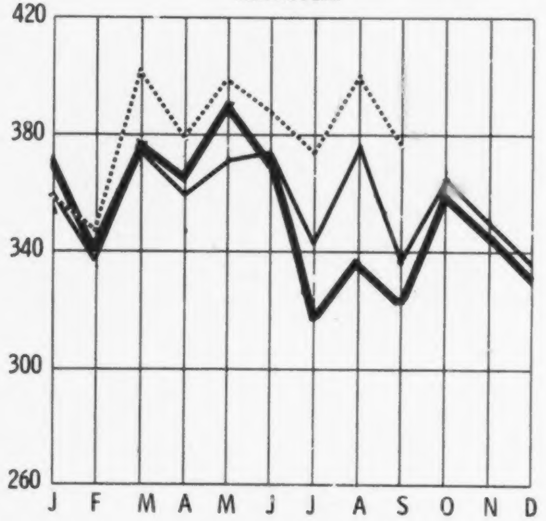
PRODUCTION

THOUSANDS OF TONS



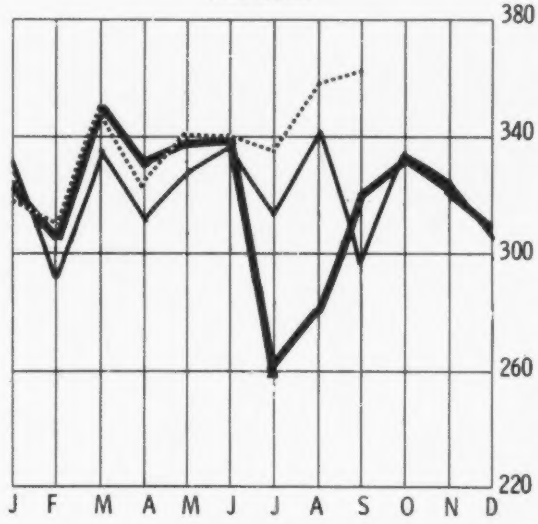
TISSUE PAPER

PRODUCTION



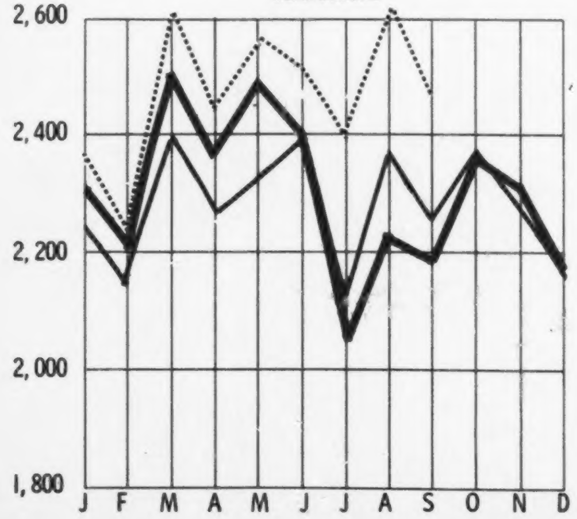
NEWSPRINT

PRODUCTION



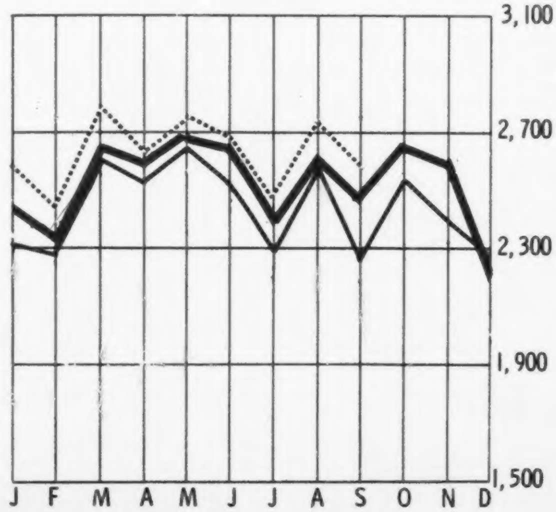
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1977 —— 1978 ━━ 1979 ....

FIBROUS RAW MATERIALS (Continued)
(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1977	YEAR 1978	MAY 1979	JUNE 1979	JULY 1979	AUG. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	74034	77025	6541	6913	6505	6955	77429	0.9
	- Total Consumpt.	74807	77290	6741	6901	6469	6644	79853	2.0
	- Residues *	30112	30369	2667	2689	2418	2707	30284	-1.8
	- Inventories	6187	6244	4603	4599	4558	4847	4847	-8.9
So. Atlantic	- Total Receipts	23727	25353	2129	2262	2235	2224	26022	3.8
	- Total Consumpt	23820	25204	2165	2316	2353	2158	26655	4.9
	- Residues *	7880	8513	730	773	745	766	8943	5.7
	- Inventories	1003	1191	962	913	859	972	972	22.3
Northeast	- Total Receipts	5954	6664	571	680	599	656	7382	11.4
	- Total Consumpt	6250	6607	632	641	558	625	7640	14.5
	- Residues *	1426	1662	145	145	118	158	1707	2.2
	- Inventories	584	770	540	578	597	625	625	3.3
South Central	- Total Receipts	24367	25572	2294	2349	2136	2332	26289	5.3
	- Total Consumpt	24394	25678	2292	2310	2094	2232	26813	5.1
	- Residues *	8415	8418	803	784	664	721	8907	6.2
	- Inventories	1279	1194	755	836	787	874	874	-1.0
North Central	- Total Receipts	4996	5291	421	502	495	539	5417	4.3
	- Total Consumpt	5261	5330	500	474	409	453	5618	6.8
	- Residues *	1430	1456	132	134	130	131	1467	7.6
	- Inventories	1029	968	639	627	709	786	786	-14.7
West	- Total Receipts	14990	14145	1126	1120	1040	1204	12320	-17.3
	- Total Consumpt	15082	14471	1152	1160	1055	1176	13128	-14.7
	- Residues *	10961	10320	857	853	761	931	9260	-15.4
	- Inventories	2292	2121	1707	1646	1606	1590	1590	-25.0

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1978 Tons	YEAR 1978 $000	JULY 1979 Tons	JULY 1979 $000	AUG. 1979 Tons	AUG. 1979 $000	Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	267517	11155	11806	526	32081	1389	205343	-12.2
Pulpwood Chips	1817114	34737	109507	1896	149101	2785	1503065	-26.0
Wood Pulp, Total	3847590	1041860	323802	111407	360878	125273	4204194	11.3
Waste Fibrous Materials, Total	99872	13581	7730	1179	10979	1868	94615	-11.9
Paper,Paperboard&Products,Total	8666058	2496771	678993	222928	758809	244314	8520477	-1.8
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8625089	2454161	674791	217966	755542	240100	8477559	-1.9
Paper, Total	8209265	2382065	636536	211056	714175	232647	8038956	-2.5
Newsprint	7477824	2108925	559104	178530	626437	196009	7092659	-6.3
Printing,Writing & Rel.Pap.	592897	215790	66212	26628	76060	30697	803784	45.7
Pack. & Ind. Conv. Paper	126672	50896	8916	4353	9604	4681	121473	6.0
Special Industrial Paper	556	595	354	328	127	157	3153	722.8
Tissue Paper	11315	5860	1950	1217	1947	1104	17888	68.7
Paperboard, Total	97162	16488	5694	1313	6648	1533	74629	-22.9
Wet Machine Board	1437	758	156	79	81	34	1565	12.9
Construction Paper and Bd. *	317225	54849	32405	5518	34638	5886	362409	24.3
Convtd Paper&Paperbd Products	40970	42611	4203	4962	3267	4214	42919	14.3

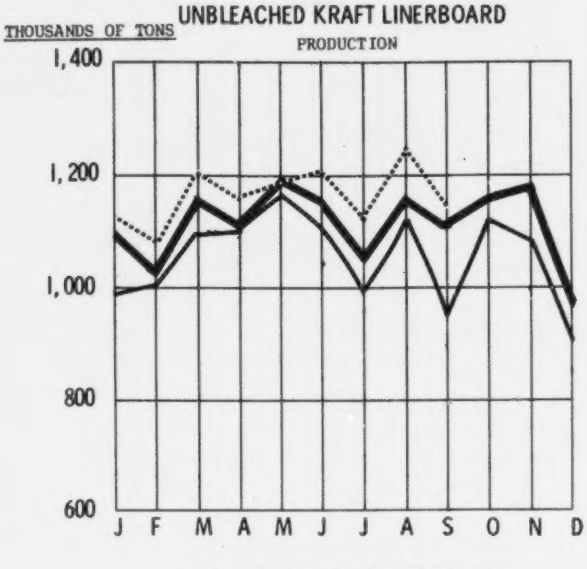
EXPORTS TO CANADA

	YEAR 1978 Tons	YEAR 1978 $000	JULY 1979 Tons	JULY 1979 $000	AUG. 1979 Tons	AUG. 1979 $000	Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	216233	8823	13837	581	12466	545	307103	46.3
Pulpwood Chips	89406	4695	9549	430	11472	566	104342	34.3
Wood Pulp, Total	98813	32570	10741	3684	15358	5928	134471	40.5
Cotton Pulp & Other Pulp	12291	4437	405	178	720	341	8646	4.4
Waste Paper	341671	33467	41471	4674	47994	4837	442655	39.3
Paper,Paperboard&Products,Total	667324	356156	45779	24396	59259	31722	627947	-8.9
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	469501	232442	30985	15482	41533	21182	456771	-5.9
Paper, Total	196765	143884	10992	8817	16677	12401	175204	-16.0
Newsprint	2368	1794	256	195	286	139	3465	57.4
Printing,Writing & Rel.Pap.	115565	80005	6833	5039	9711	6515	106339	-15.2
Pack. & Ind. Conv. Paper	28732	13338	1211	543	1812	1206	16333	-46.9
Special Industrial Paper	40579	41156	2050	2579	4231	3966	40228	-0.3
Tissue	9522	7592	642	460	637	574	8840	-11.6
Paperboard, Total	220964	70738	16729	5246	20787	7303	234531	4.7
Wet Machine Board	4906	2446	290	129	567	333	5623	33.1
Construction Pap. & Bd. E *	46866	15374	2974	1289	3502	1145	41412	-15.1
Convtd Paper&Paperbd Products	197823	123714	14794	8915	17726	10541	171176	-15.9
* - Hard Pressed Board (not in total)								
Imports of Hard Pressed Bd.	22803	3622	1417	288	2089	378	21666	-6.3
Exports of Hard Pressed Bd.	18926	5216	1200	392	1720	554	22250	16.8

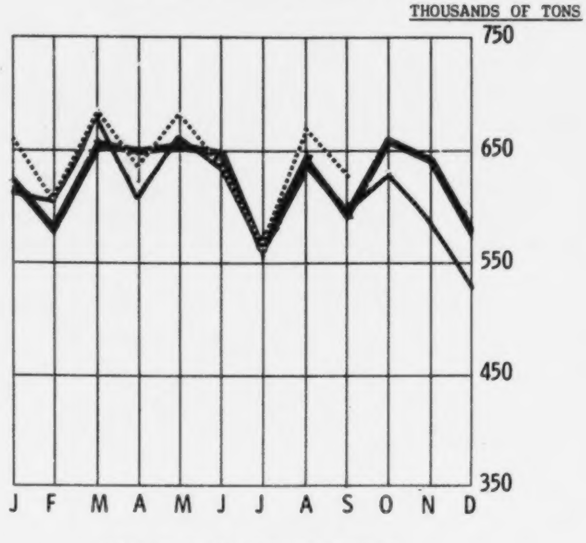
SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

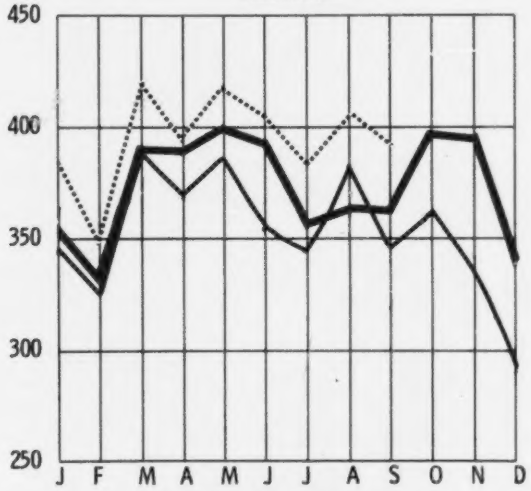


RECYCLED PAPERBOARD



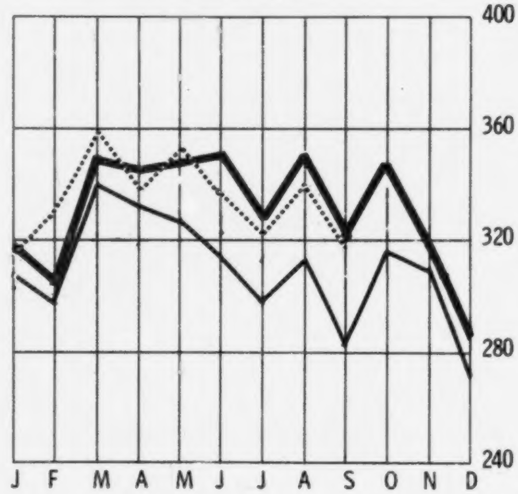
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



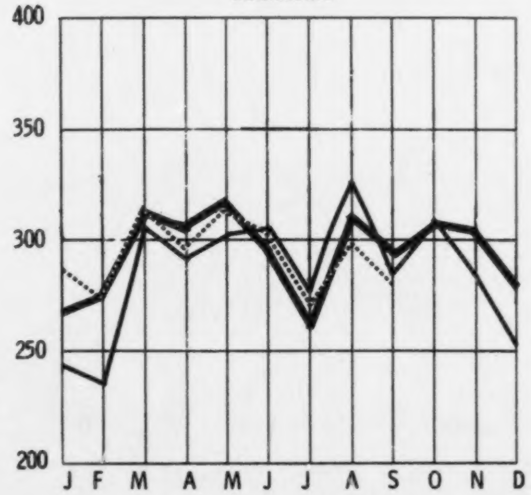
SOLID BLEACHED PAPERBOARD

PRODUCTION



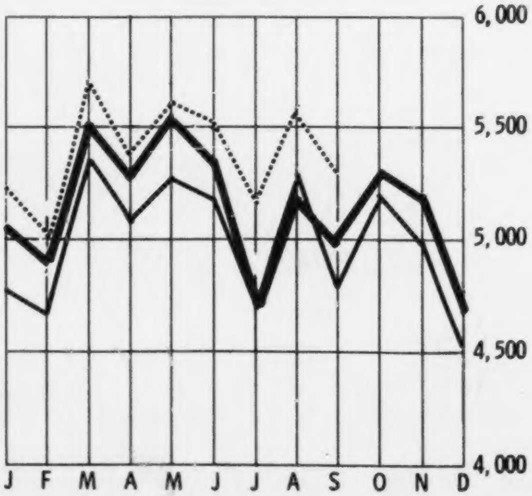
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1977 ——— 1978 ▬▬▬ 1979 ....

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

I M P O R T S

	YEAR 1978		JULY 1979		AUG. 1979		Annual Rate Y-T-D 1979	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000		
Pulpwood, Roundwood (in cords of 128 cubic feet)	270662	11481	11806	526	32081	1389	205343	-14.0
Pulpwood Chips	1819169	34864	109507	1896	149101	2785	1573608	-24.1
Total All Imports	13267526	3926572	1101290	385895	1202139	414413	13697480	3.5
Wood Pulp, Total	4024560	1086438	352022	120210	378171	131137	4384599	11.2
Waste Paper	69440	7253	5701	795	6724	1027	64419	-11.0
Other Fibrous Materials	56093	16854	3325	1013	5476	1388	49258	-17.9
Paper,Paperbd&Products,Total	9117433	2816028	740242	263876	811768	280861	9199204	0.4
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9024340	2640421	731301	243889	803430	261746	9104174	0.4
Paper, Total	8591929	2562762	690203	236195	759611	253576	8641088	-0.3
Newsprint	7483720	2111648	577382	184768	634156	197721	7244216	-4.4
Printing & Writing	958157	385371	99844	44334	112476	48663	1226729	29.4
Uncoated Groundwood	521602	177010	67591	25526	82604	30919	825688	70.7
Uncoated Book	203204	78744	10739	5456	9460	4674	158700	-28.3
Coated Print.& Impres. Pap	213658	109204	17658	10057	16532	9547	205124	-8.7
Bristols	618	427	688	354	170	92	2719	379.2
Writing and Similar Paper	11748	14284	1378	1635	2302	2335	20319	109.5
Thin (except Cigarette)	7327	5703	1791	1306	1407	1096	14180	79.9
Total Pkg & Other Paper	138132	59377	11025	5873	11032	6087	151859	22.0
Unbleached Kraft Paper	64623	19296	5339	1990	5126	1988	73166	30.2
Other Pkg. & Indust. Paper	73509	40081	5685	3882	5906	4099	78693	15.3
Tissue	11920	6366	1952	1221	1947	1105	18284	68.9
Paperboard, Total	100102	18283	6372	1564	6723	1651	76520	-21.7
Test or Containerboard	31860	5185	1207	298	1381	401	18419	-43.6
Semi-Chemical Corrugating	48027	7412	2867	497	3316	566	35119	-24.8
Other Paperboard	20215	5685	2299	870	2026	684	22982	25.1
Wet Machine Board	2717	1497	165	85	215	172	2453	-18.7
Construction Paper & Bd. *	329593	57879	34562	5945	36881	6347	384113	26.3
Building Paper	271870	47017	29483	4836	32726	5450	332800	36.2
Insulating Board	25392	4997	1704	358	1704	381	22229	-13.0
Other Building Board	32331	5865	3374	752	2452	517	29085	-15.0
Convtd Paper&Paperbd Products	93093	175607	8941	19987	8338	19115	95030	3.4
Paper Products, Total	86791	164651	8061	18819	7853	18217	89249	4.4
Paperboard Products, Total	6302	10956	880	1167	485	898	5782	-10.1
Notes								
Other: No Weight Avail. ($000)		78967		6739		7723	80772	7.0
Total Imports Incl. Other($000)		4005539		392634		422135	4698844	18.6

E X P O R T S

Pulpwood, Roundwood (in cords of 128 cu. ft.)	218270	8960	13917	592	12466	545	307496	45.1
Pulpwood Chips	3617574	156779	416987	16739	377408	17537	4313877	20.1
Total All Exports	7659628	2571426	753717	280595	729657	278520	8530838	13.2
Wood Pulp,Total	2598952	817102	279304	103482	247042	94904	2775276	8.2
Cotton Pulp and Other Pulp	88481	47987	8369	4803	8409	4596	126648	49.2
Waste and Old Paper	1599449	145884	170743	21064	191141	22915	2106596	37.4
Paper, Paperbd&Products, Total	3372746	1560452	295301	151246	283065	156105	3522318	5.0
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	2895732	1108079	250278	103586	233691	105946	2974296	3.1
Paper, Total	542675	415574	39207	35279	46336	40454	535734	-5.0
Newsprint	82454	29947	6582	3196	3320	1611	54184	-45.2
Printing & Writing	266096	208801	19158	17201	24493	19933	274089	3.5
Uncoated Groundwood	58109	37154	5210	4180	7695	5194	82027	76.3
Clay Coated Paper	73592	54358	5215	4088	7131	5202	72142	-1.8
Uncoated Free Sheet	84896	66185	4481	4359	5071	5246	66822	-27.4
Other Printing & Writing	49500	51103	4253	4574	4596	4292	53099	0.5
Total Pkg. & Other Paper	172995	159013	11636	13405	16218	16726	180648	1.3
Unbleached Kraft	45442	17440	4048	2190	2040	1305	49679	6.4
Other Pkg. & Indust. Paper	127553	141573	7588	11215	14178	15422	130969	-0.5
Tissue	21130	17814	1830	1477	2305	2183	26813	23.2
Paperboard, Total	2281653	662216	206565	65969	182106	63317	2374002	5.6
Solid Wood Pulp	2078118	576605	194657	60135	169976	58178	2200467	7.4
Total Linerboard	1539510	344110	148945	38673	110116	30601	1567412	4.3
Bleached Kraft Linerboard	194421	50671	15340	4199	11452	3406	185553	-9.0
Unbleached Kraft Linerbd	1345089	293439	133605	34474	98664	27196	1381859	6.4
Other Unbleached Kraft	65833	22330	3161	1439	11327	3258	92019	33.0
Other Bleached Kraft	440724	204423	41011	19627	47466	23971	525948	20.1
Semi-Chemical Corrugating	32051	5742	1540	396	1068	348	15088	-61.4
Recycled Paperboard	203535	85611	11908	5834	12130	5139	173535	-12.8
Wet Machine Board	7554	4805	389	225	667	425	7927	23.1
Construction Paper & Bd. *	63850	25485	4117	2113	4582	1750	56633	-13.5
Building Paper	37166	13220	2177	1105	3127	1116	35256	1.5
Insulating Board E	26684	12265	1940	1008	1455	634	21376	-30.5
Convtd Paper&Paperbd Products	477014	452373	45023	47660	49374	50160	548022	16.3
Paper Products, Total	274884	326728	27476	35568	30258	35960	322591	17.2
Paperboard Products, Total	202130	125645	17547	12092	19116	14200	225431	15.1
Notes								
Other: No Weight Avail. ($000)		7523		733		992	8176	16.0
Total Exports Incl. Other($000)		2578949		281329		279512	3145559	25.4
* Hard Pressed Board (not in total)								
Imports of Hard Pressed Board	295729	40483	22503	3069	18881	2750	252723	-16.9
Exports of Hard Pressed Board	25571	8541	1978	825	4011	1353	33083	26.3

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1977	YEAR 1978	APRIL 1979	MAY 1979	JUNE 1979	JULY 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
					R	P		
PAPER								
Newsprint	3525	3535	301	328	293	292	3631	-0.1
Uncoated Groundwood Papers	1578	1525	141	134	146	131	1664	5.0
Coated Papers	4189	4514	382	398	368	377	4578	1.0
Uncoated Free Sheet (1)	6914	7358	626	637	632	582	7400	-0.6
Cotton Fiber Paper (1)	118	119	11	12	11	9	129	14.7
Thin Papers	362	354	32	34	32	29	380	8.0
Bleached Bristols	1034	1094	94	99	97	83	1111	2.1
Tissue Paper	4262	3957	365	376	363	343	4276	2.3
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3980	3887	318	338	327	312	3833	-7.3
Other Paper (1)	1529	1385	146	156	154	140	1749	21.0
TOTAL PAPER GRADES	27491	27729	2417	2511	2422	2298	28750	0.8
PAPERBOARD								
Solid Wood Pulp Furnish	21689	21536	1912	1973	1945	1876	22700	5.9
Unbleached Kraft Linerboard	12880	13127	1141	1173	1172	1132	13676	4.7
Other Unbl. Kraft Paperboard	820	880	86	94	96	90	1060	22.0
Bleached Kraft Paperboard	3851	3604	331	350	326	319	3826	6.4
Semi-Chemical Paperboard	4139	3924	355	357	352	335	4138	5.7
Recycled Paperboard	7036	7187	603	616	598	512	7107	-0.7
TOTAL PAPERBOARD GRADES	28725	28723	2515	2590	2542	2388	29807	4.2
WET MACHINE BOARD	128	142	13	15	15	11	165	18.0
CONSTR. PAPER & INSUL. BOARD	3286	3374	281	302	291	254	3357	0.6
TOTAL ALL GRADES [Excl. H.P.B.]*	59630	59967	5226	5418	5270	4950	62079	2.5

WHOLESALE PRICE INDEXES

1967 = 100

	1977	1978	JUNE	JULY	AUG.	SEPT		
Pulp, Paper and Products	186.4	195.6	216.6	218.1	221.9	222.8	215.3	11.7
Pulp, Paper & Products, except Waste Paper ♦	186.4	195.6	216.8	218.3	222.2	223.1	215.6	11.8
Total Wood Pulp	281.1	266.5	309.4	321.2	322.5	322.5	307.4	17.6
Total Paper	194.3	206.1	227.8	228.4	229.6	230.6	225.7	10.9
Total Paper, exc. Newsprint	187.3	199.4	221.3	222.1	223.7	225.0	219.6	11.8
Newsprint	215.5	226.3	247.7	247.7	247.7	247.7	244.1	8.6
Total Paperboard	176.5	179.6	199.8	201.5	205.0	209.5	198.3	11.9
Total Paper and Paperboard ♦	188.7	197.8	219.0	220.0	221.9	224.0	217.1	11.2
Converted Products	176.5	186.5	207.3	208.3	213.7	213.9	206.3	12.4
Waste Paper	187.2	191.2	207.2	207.9	206.6	206.7	203.5	6.3
All Commodities	194.2	209.3	233.1	236.6	238.1	241.7	231.4	11.8
Industrial Commodities	195.1	209.4	233.5	237.2	240.3	243.8	231.5	11.7

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. ♦ Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Wholesale Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

viewpoint, however, it is clear that virtually all major sectors of the paper industry are responding to strong final demand in the market place. Newsprint production in September 1979 showed major strength, reflecting the output of two new mills that recently came on stream. Production of printing/writing papers in the third quarter of the year, adjusted for seasonal factors, was above that of the first and second quarters. In fact, each of the major paper sectors - newsprint, other printing/writing papers, tissue and total packaging and other papers, more or less followed this same pattern.

In the paperboard grades, the major strength was evident in linerboard and semi-chemical paperboard - the containerboard grades. The seasonally adjusted rate of solid bleached board, however, eased slightly in the third quarter of the year from the second quarter rate. Production of recycled paperboard held fairly steady, pointing to a rate about 1% ahead of that of 1978. If paperboard production maintains its third quarter rate for the remainder of the year, it will show a 3.6% gain over the 1978 level.

One further point: Hurricane Frederick hit several paper and paperboard mills in Mississippi quite hard, resulting in a measurable effect on production of both paper and paperboard in the middle of September. These mills are now largely back in production. As of this time, there are three mills in the industry on strike, although one is being operated by supervisory personnel.

In sum, demand for paper and paperboard, whether gauged by the level of activity in its end-use markets, the rate of incoming orders or the level of unfilled orders, is still strong, with no evidence at the mill level of near-term collapse.

Sales and Earnings

The strength in paper and paperboard demand in the first three quarters of 1979 was well reflected in levels of sales and earnings of paper and paperboard companies. Data on sales of 21 paper companies reported in the business press show a third quarter volume of sales of $7.3 billion, about 14% above

Continued on Page 12

Continued from Page 11

its year-ago level. These companies reported earnings from continuing operations (that is before taking into account any extraordinary charges) of $461 million, which was 36% above the total in the year-ago strike-depressed quarter. Their third quarter 1979 sales margin was 6.3%, compared to 5.3% in the third quarter of 1978.

Normally, paper company sales decline in the third quarter as mills shut down for holiday maintenance and repair. This year, however, third quarter sales were a little above the second quarter level, but there was a decline in after-tax earnings.

For the first three quarters of 1979, these companies reported sales at $21.1 billion, 13% ahead of the year-ago level, and profits at $1.4 billion, up 35%. The January-September 1979 margin on sales was 6.8%.

The table below summarizes the data.

21 PAPER AND ALLIED PRODUCTS COMPANIES
($ Million)

	1979			1978			% Change 79/78	
	Sales	Earnings	Margin on Sales	Sales	Earnings	Margin on Sales	Sales	Earnings
Quarter I	6,591	430	6.5%	5,790	298	5.1%	+13.8%	+44.4%
Quarter II	7,184	538	7.5%	6,498	424	6.5%	+10.6%	+27.0%
Quarter III	7,284	461	6.3%	6,376	338	5.3%	+14.2%	+36.4%
First 3 Quarters	21,060	1,429	6.8%	18,664	1,059	5.7%	+12.8%	+34.9%

21 PAPER AND ALLIED PRODUCTS COMPANIES
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Quarter I	6,591	430	6.5%	5,790	298	5.1%	+13.8%	+44.4%
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Quarter III	7,284	461	6.3%	6,376	338	5.3%	+14.2%	+36.4%
First 3 Quarters	21,060	1,429	6.8%	18,664	1,059	5.7%	+12.8%	+34.9%

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

October 16, 1979

PRODUCTION (000 TONS)

	Sept 1979	Aug. 1979	Sept 1978	Jan - Sept 1979	1978	% Change 79/78
PAPER GRADES	P	R				
Newsprint	365	360	319	3042	2811	8.2
Uncoated Groundwood (s)	117	131	102	1093	965	13.3
Coated Paper (s)	373	403	356	3365	3344	0.6
Uncoated Free Sheet Paper (s)	627	696	571	5851	5423	7.9
Thin Paper (c)	32	35	29	289	265	8.9
Cotton Fiber Paper (s)	11	11	10	94	85	10.5
Bleached Bristols (c)	88	100	86	836	819	2.2
Tissue Paper	375	400	325	3421	3183	7.5
Unbleached Kraft Packaging & Indl. Converting (s)	330	337	311	2998	2978	0.7
Other Paper (c)	150	155	109	1325	1087	21.9
TOTAL PAPER	2469	2628	2216	22313	20959	6.5
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1142	1233	1104	10456	9971	4.9
Other Kraft Paperboard	89	101	89	938	914	2.7
Semichemical Paperboard	387	406	358	3546	3322	6.7
Bleached Paperboard	318	340	323	3018	3029	-0.4
Recycled Paperboard	622	670	606	5740	5613	2.3
TOTAL PAPERBOARD	2558	2750	2480	23698	22849	3.7
CONSTRUCTION & WET MACH GRADES(c)	279	299	288	2633	2629	0.1
TOTAL PAPER AND PAPERBOARD	5305	5677	4984	48644	46437	4.8
HARD PRESSED BD.[not in total](c)	175	195	171	1608	1664	-3.4

WOOD PULP (ALL GRADES)	Aug. 1979	July 1979	Aug. 1978	Jan - Aug. 1979	1978	% Change 79/78
Dissolving & Special Alpha	155	125	115	993	1010	-1.7
Bleached Sulphite	119	111	117	885	1049	-15.6
Unbleached Sulphite	35	31	5	266	206	29.2
Bleached & Semi-Bl. Sulph.	1596	1460	1438	12041	11459	5.1
Unbleached Sulphate	1681	1586	1598	13143	12686	3.6
Semichemical	441	419	327	3148	2676	17.6
Groundwood and Thermo-Mechanical	387	360	305	2976	2898	2.7
TOTAL PULP DIVISION DATA	4415	4092	3904	33453	31984	4.6
Defib. Exploded & Scrngs E	276	258	292	2093	2119	-1.2
TOTAL WOOD PULP PRODUCTION	4690	4350	4196	35545	34103	4.2

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments　　R - Revised　　E - Estimate
P - Preliminary　　(c) - Census Data - Production, last 2 months estimated.

October 22, 1979

	Full Year		INDUSTRY DATA 1979			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1977	1978	July	August	September		
Total Production (API).......! !...	59778	61642	5134	5677	5305	64859	4.8
Total Seasonally Adjusted....! excluding !...			5365	5429	5503	64659	4.8
Imports (including Products).!hard pressed!...	7432	9117	740	812	750 E	9177	0.7
Exports (including Products).! board !...	3230	3373	295	283	273 E	3495	3.6
Apparent Consumption.........! !...	63980 a	67386 b	5810	5958	5980	70341c	4.3
Paper Production % Tonnage Capacity...........	91.9 s	91.7 s	88.5	96.9	94.4	96.0 sh	—
Paperboard Production % Tonnage Capacity......	90.9 s	92.7 s	85.5	93.9	90.0	93.8 s	—
			June	July	August		
MARKET WOOD PULP PRODUCTION - Tons (000)........	4819	5165	501	487	514	5571	5.6
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	46652	47662	4321	4092	4415	50179	4.6
WOOD PULP IMPORTS - TONS (000)..................	3864	4025	347	352	378	4385	11.2
WOOD PULP EXPORTS - TONS (000)..................	2640	2599	310	279	247	2775	8.2
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			June	July	August		
Wood Pulp..(k)................................	47596	48777	4344	4146	4114	50682	3.6
Waste Paper....(d)............................	14058	14600	1254	1122	1295	14969	2.2
Other (Census)................................	745	666	55	45	55 E	657	-1.6
Total.................	62399	64044	5654	5313	5464	66308	3.2
..WOOD PULP - NON PAPER	876	884	72	76	75 E	915	5.3
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	74807	77290	6901	6469	6644	79853	2.0
EMPLOYMENT (000)			July	August	September		
Paper and Allied Products..........Total......	691.6 R	700.9 R	719.6 R	723.8 R	721.8	713.9 R	1.8
Pulp, Paper and Board Mills........Total......	272.3 R	267.0 R	276.6 R	277.4 R	277.5 E	271.3 R	0.8
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products.....................	5.96	6.52	7.17	7.21	7.27	7.01	8.8
Pulp, Paper Mills.............................	6.75	7.44	8.33	8.40	8.47 E	8.10	10.4
Paperboard Mills..............................	6.94	7.68	8.47	8.44	8.47 E	8.22	8.9
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q2	1979 Q3	1979 Q4		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)#	3.36	3.46	4.80	4.68	5.14	4.79	38.4
INDEX OF OUTPUT PER MAN-HOUR (1967=100)..........			May	June	July		
!IN PULP, PAPER !...Production Workers..........	142.0	149.6 R	153.1 R	152.3 R	149.1	153.1 R	2.9
!AND BOARD MILLS!...All Employees...............	138.6	144.9 R	148.6 R	147.9 R	144.6	148.2 R	2.4
PAPER AND ALLIED PRODUCTS (Million $)			June	July	August		
Industry Shipments (Dept. of Commerce)#.......	52368	57654	5479	5659	5668	65436	15.6
Pulp, Paper and Paperboard#.................	23701	25343	2536	2541	2583	29642	18.4
Inventories (End of Period) - Total Industry#.	5628	5875	6344	6464	6352	6352	9.5
Pulp, Paper and Paperboard#.................	2102	2006	2090	2110	2143	2143	6.8
			1978 Q4	1979 Q1	1979 Q2		
Sales (Corporations Only, FTC).................	45750	48982 RS	12841	12997	13828	53650	12.9
Earnings (Corporations Only, FTC)..............	2367	2598 RS	734	867	917	3568	42.7
Depreciation (Corporations Only, FTC)..........	1663	1726 RS	445	447	479	1852	10.5
Net Worth (Corporations Only, FTC).............	19704	20794 RS	20794	21282	21808	21808	9.9
PRICE INDEXES (Bureau of Labor Stats)1967=100			July	August	September		
Total Pulp, Paper and Allied Products.........	186.4	195.6	218.1	221.9	222.8	215.3	11.7
Wood Pulp.....................................	281.1	266.5	321.2	322.5	322.5	307.4	17.6
Waste Paper...................................	187.2	191.2	207.9	206.6	206.7	203.5	6.3
Paper...	194.3	206.1	228.4	229.6	230.6	225.7	10.9
Paperboard....................................	176.5	179.6	201.5	205.0	209.5	198.3	11.9
PAPER DEMAND (INDEXED: 1967=100)			July	August	September		
Total Paper Production #......................	131.0	133.1	144.1	146.6	146.4	142.2	6.5
Paper New Supply #............................	124.0	131.2	138.6	143.2	141.0	138.2	5.1
Total End - Use Index #.....................	134.4	139.5	143.6	144.6	144.8	144.3	4.1
Production of Nondurable Goods #...(19%)..	150.5	156.9	163.9	164.1	164.4	162.8	4.5
Disposable Income (Constant $) #...(23%)..	138.6	145.2	148.2	147.8	147.4	148.4	2.9
Total Printing and Publishing #...(58%)..	127.6	131.5	135.2	137.0	137.4	136.7	4.5
Trend Factor	----------Not Available----------						
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production #................	127.0	132.8	135.8	136.2	140.4	137.5	3.8
Production for Domestic Use	271.3	227.3	134.6	133.7	139.5	135.9	3.9
Total End - Use Index #.....................	141.6	147.7	152.5	150.5	151.5	151.9	3.7
Production of Consumer Goods #...(60.49%)	145.3	149.1	151.1	148.4	149.9	150.8	1.7
Production of Equipment #...(6.62%)	123.0	132.8	142.2	142.0	143.1	141.5	7.8
Production of Materials #...(32.89%)	138.6	148.3	157.2	156.0	156.2	155.8	6.7
Trend Factor	----------Not Available----------						
NEWSPRINT MARKETS			June	July	August		
Consumption by Publishers - Tons (000)........	10228	10872	913	863	911	10955	3.7
Newspaper Pub. and Printing Emp. Total (000)..	395.6	407.4	422.1	422.5	421.8	418.0	2.8
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	106489	115317	9558	8068	7596	95486	-8.9
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	15482	17586	1651	1585	1770	19434	12.9
Inventories (End of Period)	1261	1482	1616	1608	1606	1606	18.0
Paper Only................................Sales	11799	13079	1252	1192	1328	14753	16.0
Inventories (End of Period)	873	1025	1090	1179	1070	1070	16.2
RETAIL TRADE (Million $)			July	August	September		
Total Retail Sales #..........................	724020	798818	72370	74621	76263	869812	10.9
Nondurable Goods Stores Sales #...............	476188	520902	47899	48791	49822	568295	10.7
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)#.	138.2	146.1	152.8	151.5	152.3	151.0	4.4
WHOLESALE PRICES(ALL COMMODITIES)(INDX 1967=100)	194.2	209.3	236.6	238.1	241.7	231.4	11.8
			June	July	August		
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	181.5	195.4	216.6	218.9	221.1	212.9	10.6
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	230.8	275.6	291.9	295.1	299.8	299.8	15.5
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1979 Q1	1979 Q2	1979 Q3		
G.N.P. or Expenditure - Current $.............	1899.5	2127.6	2292.1	2329.8	2391.5	2337.8	11.8
G.N.P. OR Expenditure - 1972 $................	1340.5	1399.2	1430.6	1422.3	1430.8	1427.9	2.7

lb/capita	Popul.(mil)
.a - 590	216.8
.b - 616	218.5
.c - 638	220.4

.d - 1977 - 12192; 1978 - 13185
. (000 tons)as pub. by
. U.S. Census Bureau
.E - Estimate

f - Wood Pulp Production excludes estimates for defibrated exploded & screenings. Production was: 1977 - 3,218; 1978 - 3,138 (000 tons)
s - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '77 - 1,688; '78 - 1,655 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
w - Full year estimated by U.S. Dept. of Commerce
- Seasonally adjusted

A2500-2

MONTHLY STATISTICAL SUMMARY

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No. 57 NOVEMBER 1979 No. 11

Current Trends

In the face of widespread fears of an immiment downturn in total economic activity, demand for paper and paperboard continues to keep mills operating at near capacity levels. New orders for printing papers and paperboard - the two sectors for which such data are available - are holding up well, coming in at a rate close to their year-to-date average levels. Unfilled order backlogs are generally at or above their year-to-date average, with uncoated groundwood paper unfilled orders at a high for the year.

There is some concern over inventory building in the fourth quarter, which would affect production levels in the early months of 1980. Recent data on inventories in the economy as a whole suggest that inventory additions were rather small in the third quarter. High interest rates in the fourth quarter will further defer any deliberate build up in stocks. Available data on inventories at paper and paperboard mills, at converting plants, and at paper merchants indicate relative balance in relation to rates of usage.

Paper and paperboard new supply (production plus imports less exports) in the first ten months of 1979 is estimated at a

Continued on Page 2

Continued from Page 1

rate of 70 million tons per year, 3.9% above the corresponding 1978 rate, in line with general business activity. Total industrial production is up by more than 4%, while real GNP in the first three quarters of 1979, showed nearly a 3% gain.

Production

Although total paper and board production rose nearly 8% from September to October, to a level nearly 7% over the strike-depressed level of October 1978, this was less than the usual seasonal increase. The October seasonally adjusted rate eased to 64.2 million tons per year from the 65 million ton per year rate for the third quarter of the year. However, paper and paperboard production was close to capacity in October. If production were to maintain its October rate for the remainder of the year, the 1979 total would exceed 64.5 million tons, for a 4.7% gain over the 61.6 million tons produced in 1978.

Production trends of the various paper and paperboard grades continued along the respective tracks developed in the earlier months of the year. Demand for printing papers was relatively strong, reflecting high levels of output in the printing and publishing industry. Tissue paper production has been extremely strong, with the January-October 1979 total some 7-½% over the strike affected year-ago level. The major strength in paperboard production continued in the containerboard sector, reflecting strong demand for corrugated shipping containers. Production of both bleached and recycled folding boxboard is barely matching year-ago levels. Total solid bleached board is holding close to year-ago rates. With the exception of milk carton stock, the packaging grades are all below year-ago levels, but strength in the milk carton stock and in non-packaging grades just about offset the losses. Recycled paperboard production is about 2% ahead of its year-ago rate, but only recycled linerboard and gypsum wallboard facing are showing increases; the other grades are all below year-ago levels.

Imports and Exports

According to the Department of Commerce, exports of paper, paperboard and products strengthened in September from the July August rates, to bring the year-to-date rate to 3.6 million tons per year. Exports of primary paper and paperboard were up 4.3% with the paper total a shade below the year-ago level, but paperboard showing better than a 6% gain. Within the paper grades, however, exports of groundwood paper are running at 80,000 tons per year, up 63% from the 1978 level; kraft papers are about 50,000 tons a year, up 10%; other packaging and industrial converting papers are at 136,000 tons per year, up 6%. On a tonnage basis, the gains in paperboard exports are concentrated in the kraft paperboard area. Exports of paper and paperboard converted products are showing strong gains. Although the

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

	YEAR 1977	YEAR 1978	JULY 1979	AUG. 1979	SEPT 1979	OCT. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PAPER					R	P		
Newsprint - Production	3870	3768	335	360	340	350	4040	7.3
- Shipments	3866	3779	337	358	339	350	4038	6.9
Printing & Writing	13865	14545	1219	1380	1245	1348	15452	5.9
Groundwood Paper - Shipments	1331	1309	121	131	119	125	1465	13.0
- New Orders	1336	1367	130	136	124	135	1506	8.5
- Unfilled Orders	137	179	195	195	201	212	212	9.7
Coated Paper - Shipments	4261	4448	360	405	364	398	4506	0.6
- New Orders	4279	4428	393	410	331	382	4502	1.5
- Unfilled Orders	398	404	463	460	400	421	421	13.4
Unctd Free Sheet - Shipments	6777	7225	617	699	631	685	7853	8.3
- New Orders	6833	7542	635	697	628	658	7853	2.5
- Unfilled Orders	436	754	777	755	747	734	734	-4.7
Thin Paper - Production *	362	354	29	33	32	33	384	8.4
Cotton Fiber Paper - Shipments	108	114	9	11	10	12	126	11.0
Bleached Bristols -Production*	1026	1095	84	101	88	94	1118	2.1
Tissue Paper - Production	4286	4215	374	401	368	390	4572	7.5
Total Packaging & Other Paper	5390	5314	458	497	469	515	5784	7.5
Unbl. Kraft Paper - Shipments	3815	3884	321	337	319	350	3993	1.4
Other Paper - Production * #	1575	1430	137	160	150	165	1790	24.2
TOTAL PAPER-Production-Unadj.	27411	27842	2385	2637	2422	2603	29848	6.6
-Production-S.A.			2513	2568	2508	2479	29730	6.7
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	21636	22790	1922	2081	1935	2098	24065	4.4
Unbleached Kraft Linerboard	12573	13228	1123	1233	1142	1251	14048	5.3
Production for Export	1290	1466	125	142	126	141	1577	6.5
Other Unbl. Kraft Paperboard	1078	1145	95	101	89	101	1247	4.3
Semichemical Paperboard	4264	4439	380	406	387	403	4739	6.3
Production for Export	122	119	10	9	6	7	96	-19.4
Solid Bleached Paperboard	3721	3979	324	340	318	343	4031	-0.5
Production for Export	389	430	30	38	33	37	436	-0.5
Recycled Paperboard	7317	7485	562	670	622	675	7700	2.2
Production for Export	30	22	2	2	1	1	19	-15.4
TOTAL PAPERBOARD-Prod.-Unadj.	28953	30275	2484	2750	2558	2773	31764	3.9
- Production - S.A.			2582	2590	2670	2586	31348	3.9
- New Orders	29022	31194	2685	2774	2555	2854	32621	2.7
- Unfilled Orders	1037	1370	1625	1589	1622	1594	1594	4.4
WET MACHINE BOARD *	128	142	10	16	14	14	168	17.1
BUILDING PAPERS *	1850	1956	147	165	160	165	1937	-2.0
INSULATING BOARD *	1435	1417	107	132	115	125	1448	3.3
TOTAL ALL GRADES - Unadjusted	59778	61632	5133	5701	5269	5679	65165	4.9
- Production - S.A.			5364	5451	5465	5351	64588	4.9
HARD PRESSED BD. [not in total]*	2237	2180	188	194	175	200	2168	-2.5

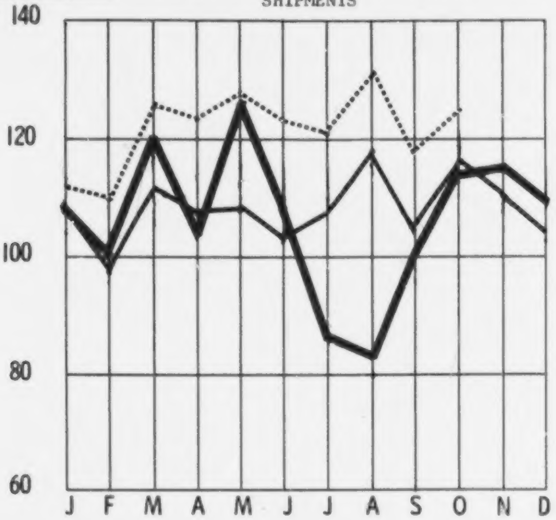
* Census Data - Production. Last two months estimated.
# Production excludes API bleached kraft envelope.
## Includes revisions not available monthly.

S.A. Seasonally Adjusted
P Preliminary
R Revised

THOUSANDS OF TONS

GROUNDWOOD PAPER, UNCOATED

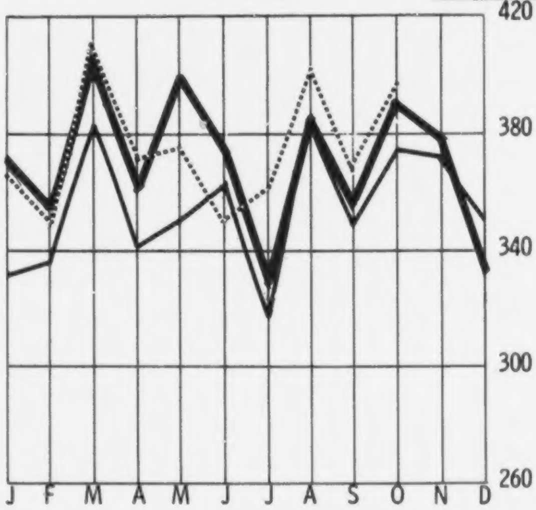
SHIPMENTS



COATED PAPER

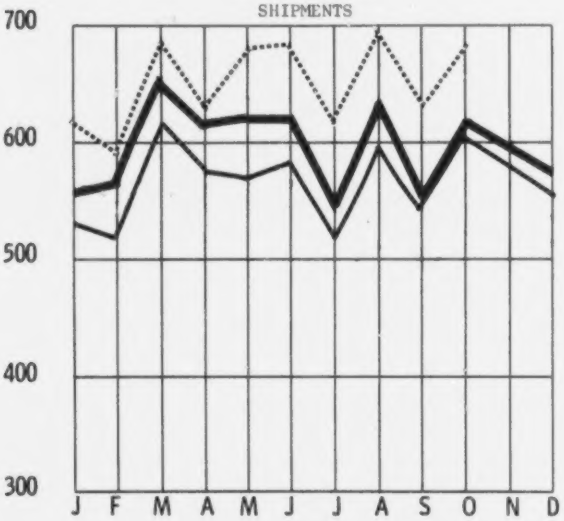
SHIPMENTS

THOUSANDS OF TONS



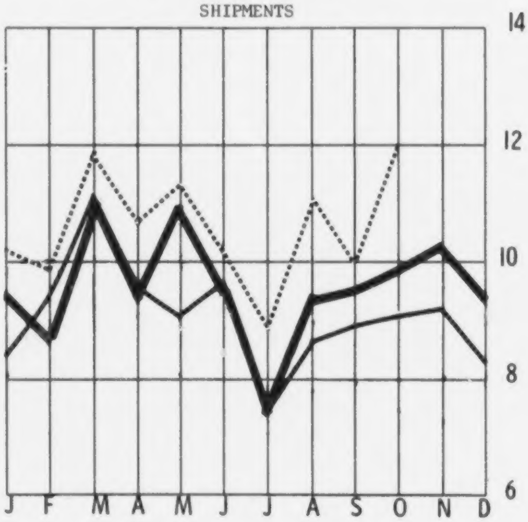
UNCOATED FREE SHEET PAPERS

SHIPMENTS



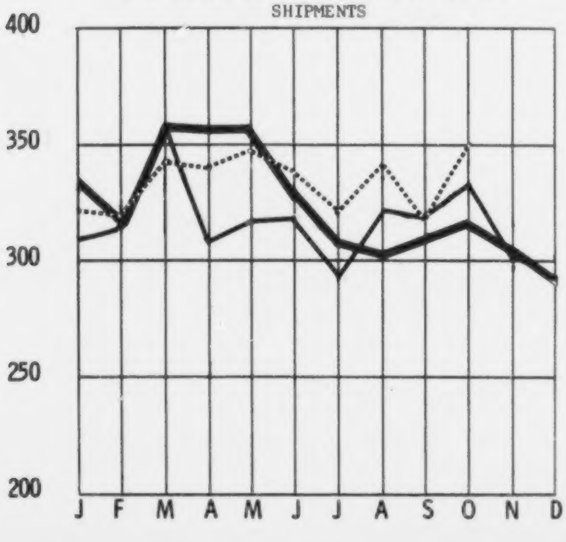
COTTON FIBER PAPER

SHIPMENTS



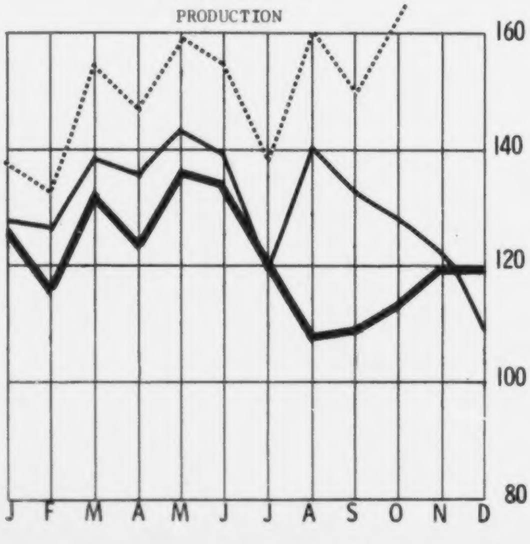
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1977 ——— 1978 ━━━ 1979 ⋯⋯⋯

WOOD PULP STATISTICS
(Thousands of Tons)

		YEAR							
		1977	1978	JUNE 1979	JULY 1979	AUG. 1979	SEPT 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
TOTAL WOOD PULP (1)						R	P		
Total Wood Pulp	- Production	46652	47662	4321	4092	4393	4087	50024	4.6
	- Imports	3864	4025	347	352	378	323	4328	10.2
	- Exports	2640	2599	310	279	247	275	2833	7.4
	- New Supply	47877	49088	4357	4165	4524	4135	51518	4.9
Dissolving Pulp	- Production	1467	1411	136	125	155	109	1469	-0.1
	- Imports	181	189	7	10	19	24	189	7.3
	- Exports	796	758	83	88	71	63	745	-6.7
	- New Supply	852	842	60	47	103	69	914	7.8
Paper Grades Chemical Pulp	- Production	36897	37847	3369	3189	3409	3213	39369	3.6
	- Imports	3481	3627	332	326	331	285	3928	10.5
	- Exports	1763	1780	217	187	171	203	2025	14.1
	- New Supply	38615	39694	3484	3327	3569	3295	41273	3.7
Groundwood and Thermo-Mech.	- Production	4403	4373	369	360	387	369	4459	2.6
	- Imports	203	208	8	16	27	14	210	7.1
	- Exports	81	62	9	4	4	8	63	-3.5
	- New Supply	4525	4519	368	371	410	375	4606	2.9
Semi-Chemical	- Production	3886	4031	446	419	441	397	4726	18.0
	- Imports	0	0						
	- Exports	0	0	------	Included	with	Groundwood	Pulp	------
	- New Supply	3886	4031	446	419	441	397	4726	18.0
MARKET WOOD PULP									
Total Market Wood Pulp	- Production	4819	5165	501	487	516	483	5598	7.3
	- Imports	2684	2816	262	247	240	226	3062	9.5
	- Exports	2359	2480	312	243	238	287	2723	9.1
	- New Supply	5144	5501	451	490	517	422	5936	7.6
Dissolving Pulp	- Production	1465	1406	136	125	155	108	1470	0.3
	- Imports	256	291	20	19	29	28	334	17.1
	- Exports	798	824	111	65	93	87	858	0.1
	- New Supply	923	873	44	79	91	49	946	5.8
Paper Grades Chemical Pulp	- Production	3263	3675	360	357	354	368	4069	11.0
	- Imports	2394	2495	242	228	210	198	2721	9.6
	- Exports	1515	1613	194	175	141	198	1820	14.0
	- New Supply	4143	4557	408	409	423	368	4970	9.2
Groundwood Pulp and All Other	- Production	90	83	6	5	6	6	58	-31.5
	- Imports	35	26	1	1	1	0	6	-74.0
	- Exports	46	42	7	3	4	2	44	6.1
	- New Supply	80	67	0	3	3	4	20	-70.1

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1977 - 3218; 1978 - 3155;A.R.Y-T-D'79 - 3143
SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

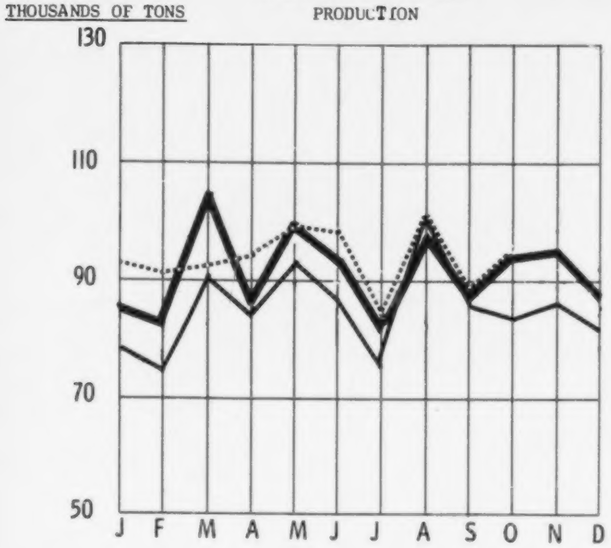
FIBROUS RAW MATERIALS
(Thousands of tons)

CONSUMPTION AT PAPER & BD. MILLS				R	P		
Total	62399	64043	5654	5321	5812	5399	66614	4.1
Total Wood Pulp (2) A	47596	48777	4344	4154	4462	4130	51033	4.6
Market Wood Pulp A	4216	4774	426	409	428	410	5071	7.0
Waste Paper (3) A	14058	14600	1254	1122	1295	1219	14931	2.5
Rags, Straw & Other C, E	745	666	55	45	55	50	651	-2.6
INVENTORIES								
Wood Pulp at Pulp Mills A	193	130	124	118	122	114	114	-29.5
Market Pulp at Pulp Mills A	277	187	165	178	166	146	146	-28.6
Mkt Pulp at Ppr.& Bd. Mills CE	404	435	452	440	440	425	425	-6.5
Waste Ppr.at Ppr.&Bd. Mills CE	728	740	666	662	662	640	640	-14.0
Rags, Straw and Other at Paper and Board Mills C, E	67	66	79	69	69	65	65	-3.0
Mkt Wood Pulp Days of Supply A	55	44	41	41	41	38	38	-21.7
Wood Pulp Consumption at at Non-Paper Mills C, E	876	884	72	77	82	78	927	7.0

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.: 1977 - 1,688,000; 1978 - 1,655,000 ton
(3) Census Waste Paper Consumpt.(000 tons): 1977 - 12192; 1978 - 13185; 1979(Annual Rate Jan-Aug) 13023

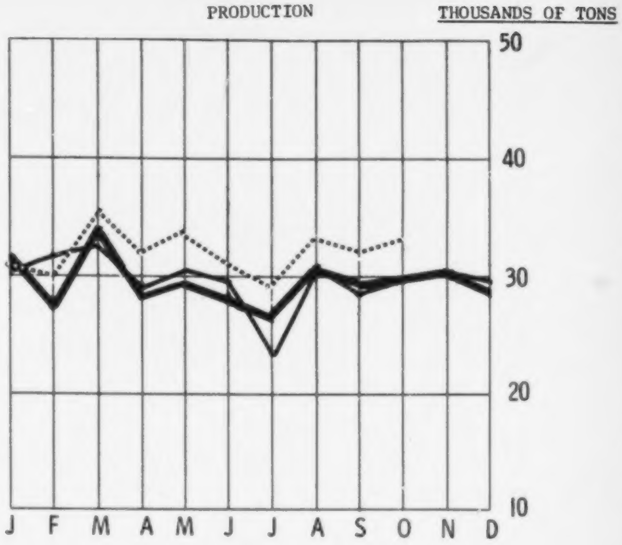
BLEACHED BRISTOLS

PRODUCTION



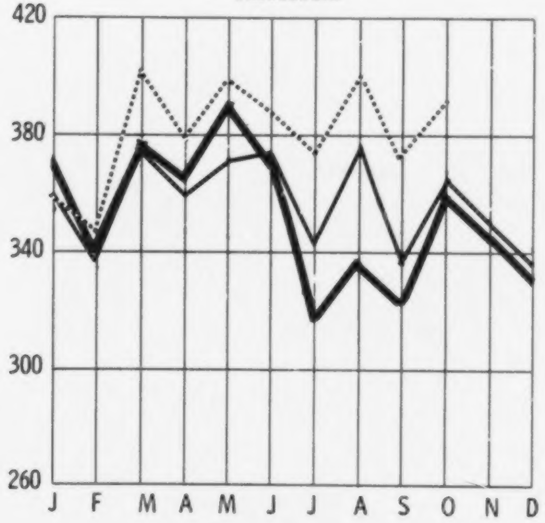
THIN PAPERS

PRODUCTION



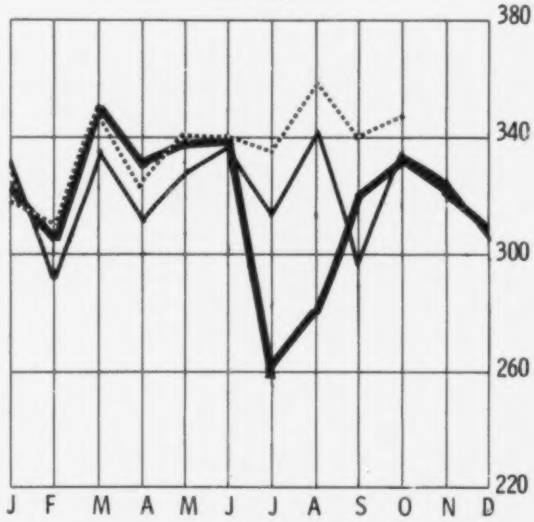
TISSUE PAPER

PRODUCTION



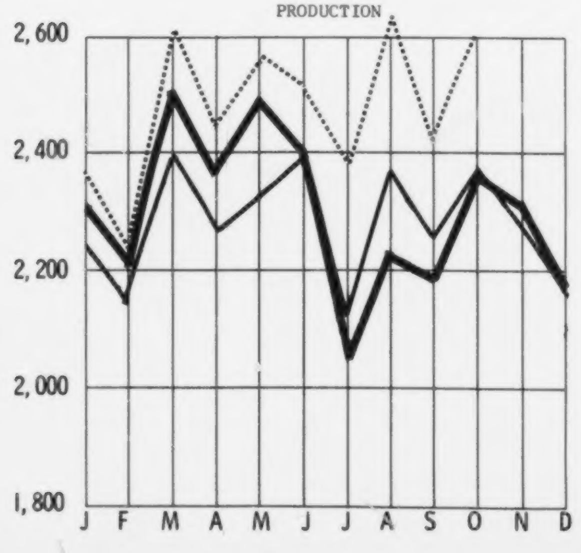
NEWSPRINT

PRODUCTION



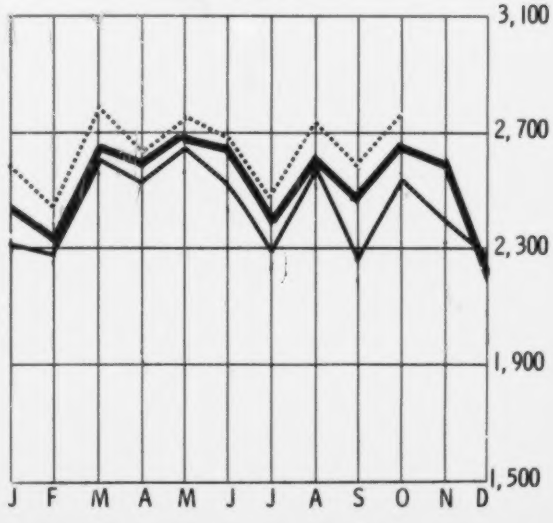
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1977——— 1978▬▬▬ 1979........

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1977	YEAR 1978	JUNE 1979	JULY 1979	AUG. 1979	SEPT 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	74034	77025	6913	6505	6955	6465	77445	1.2
	- Total Consumpt.	74807	77290	6901	6469	6644	6448	79577	2.1
	- Residues *	30112	30369	2689	2418	2707	2444	30177	-1.3
	- Inventories	6187	6244	4599	4558	4847	4943	4943	-7.8
So. Atlantic	- Total Receipts	23727	25353	2262	2235	2224	2080	25904	3.1
	- Total Consumpt	23820	25204	2316	2353	2158	2194	26619	4.7
	- Residues *	7880	8513	773	745	766	698	8880	4.8
	- Inventories	1003	1191	913	859	972	894	894	8.8
Northeast	- Total Receipts	5954	6664	680	599	656	611	7376	12.0
	- Total Consumpt	6250	6607	641	558	625	554	7529	14.6
	- Residues *	1426	1662	145	118	158	129	1689	1.5
	- Inventories	584	770	578	597	625	684	684	4.9
South Central	- Total Receipts	24367	25572	2349	2136	2332	2157	26244	5.0
	- Total Consumpt	24394	25678	2310	2094	2232	2096	26628	4.5
	- Residues *	8415	8418	784	664	721	673	8815	5.3
	- Inventories	1279	1194	836	787	874	979	979	10.1
North Central	- Total Receipts	4996	5291	502	495	539	480	5455	5.2
	- Total Consumpt	5261	5330	474	409	453	438	5577	5.2
	- Residues *	1430	1456	134	130	131	126	1472	5.3
	- Inventories	1029	968	627	709	786	832	832	-6.9
West	- Total Receipts	14990	14145	1120	1040	1204	1137	12467	-15.0
	- Total Consumpt	15082	14471	1160	1055	1176	1166	13224	-12.7
	- Residues *	10961	10320	853	761	931	818	9321	-12.6
	- Inventories	2292	2121	1646	1606	1590	1554	1554	-26.2

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1978 Tons	YEAR 1978 $000	AUG. 1979 Tons	AUG. 1979 $000	SEPT 1979 Tons	SEPT 1979 $000	Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	267517	11155	32081	1389	10392	442	196383	-17.8
Pulpwood Chips	1817114	34737	149101	2785	109522	2180	1482087	-25.0
Wood Pulp, Total	3847590	1041860	360878	125273	294506	103803	4129736	9.8
Waste Fibrous Materials, Total	99872	13581	10979	1868	10485	1723	98082	-7.5
Paper,Paperboard&Products,Total	8666058	2496771	758809	244314	644801	213963	8433493	-2.3
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8625089	2454161	755542	240100	641094	208350	8390400	-2.4
Paper, Total	8209265	2382065	714175	232647	603076	201215	7949840	-3.0
Newsprint	7477824	2108925	626437	196009	531372	171088	7013081	-6.5
Printing,Writing & Rel.Pap.	592897	215790	76060	30697	61256	24757	796149	40.5
Pack. & Ind. Conv. Paper	126672	50896	9604	4681	8762	4282	119658	2.2
Special Industrial Paper	556	595	127	157	210	267	3083	741.6
Tissue Paper	11315	5860	1947	1104	1476	819	17868	68.1
Paperboard, Total	97162	16488	6648	1533	6119	1361	74496	-22.6
Wet Machine Board	1437	758	81	34	63	35	1475	6.3
Construction Paper and Bd. *	317225	54849	34638	5886	31836	5739	364590	20.3
Convtd Paper&Paperbd Products	40970	42611	3267	4214	3707	5613	43093	15.6

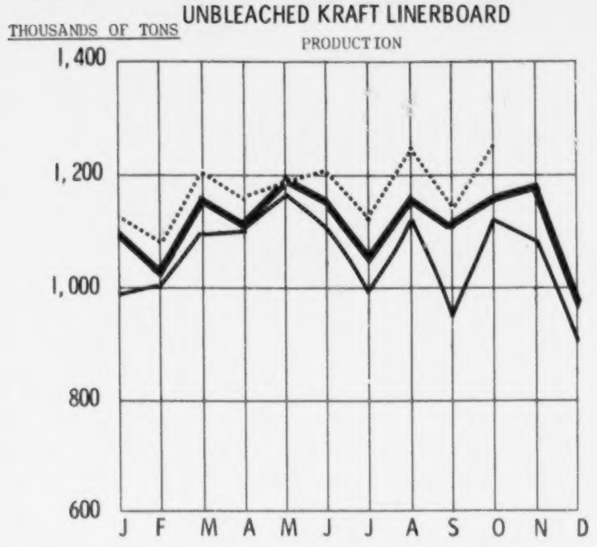
EXPORTS TO CANADA

	YEAR 1978 Tons	YEAR 1978 $000	AUG. 1979 Tons	AUG. 1979 $000	SEPT 1979 Tons	SEPT 1979 $000	Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	216233	8823	12466	545	14887	698	292829	35.5
Pulpwood Chips	89406	4695	11472	566	5097	205	99544	14.2
Wood Pulp, Total	98813	32570	15358	5928	13821	4422	137957	43.1
Cotton Pulp & Other Pulp	12291	4437	720	341	585	279	8465	5.5
Waste Paper	341671	33467	47994	4837	41841	4499	449259	39.5
Paper,Paperboard&Products,Total	667324	356156	59259	31722	53046	29090	628903	-7.4
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	469501	232442	41533	21182	38184	19603	456931	-4.4
Paper, Total	196765	143884	16677	12401	17342	12076	178859	-11.7
Newsprint	2368	1794	286	139	113	111	3230	41.2
Printing,Writing & Rel.Pap.	115565	80005	9711	6515	9858	6826	107667	-11.3
Pack. & Ind. Conv. Paper	28732	13338	1812	1206	1488	871	16503	-44.9
Special Industrial Paper	40579	41156	4231	3966	5338	3757	42875	9.3
Tissue	9522	7592	637	574	545	511	8585	-11.8
Paperboard, Total	220964	70738	20787	7303	18669	6589	233364	5.0
Wet Machine Board	4906	2446	567	333	392	199	5521	21.7
Construction Pap. & Bd. E *	46866	15374	3502	1145	1781	740	39186	-19.0
Convtd Paper&Paperbd Products	197823	123714	17726	10541	14862	9487	171973	-14.7
* - Hard Pressed Board (not in total)								
Imports of Hard Pressed Bd.	22803	3622	2089	378	4366	758	25080	7.0
Exports of Hard Pressed Bd.	18926	5216	1720	554	2007	615	22453	21.3

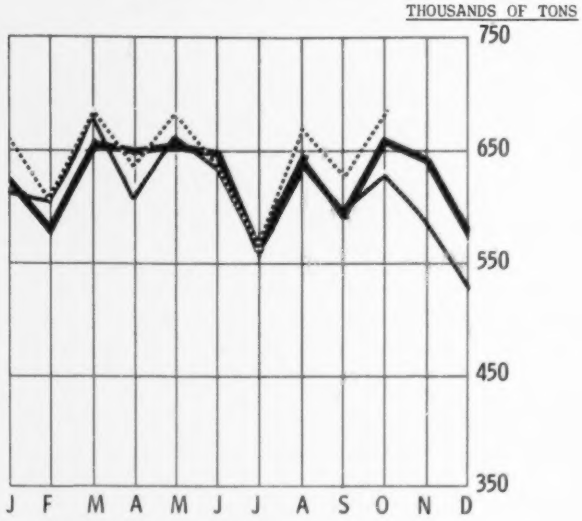
SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

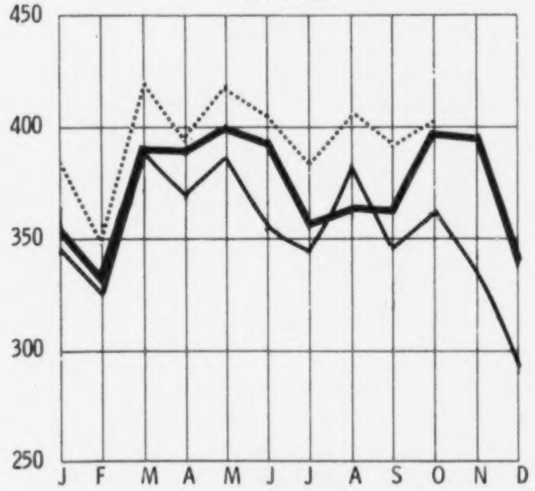


RECYCLED PAPERBOARD



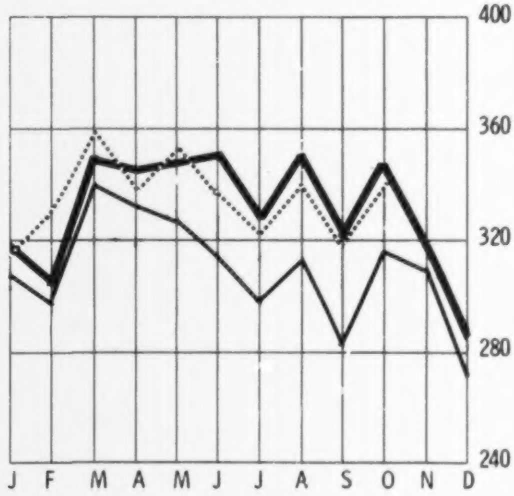
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



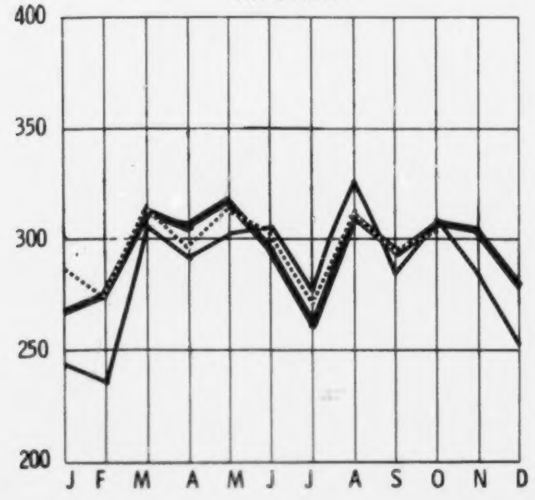
SOLID BLEACHED PAPERBOARD

PRODUCTION



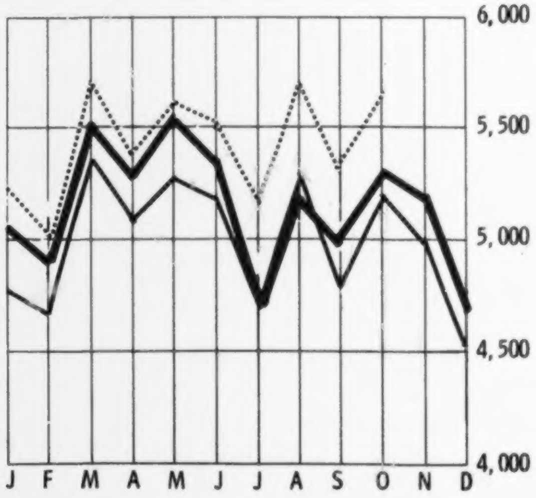
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1977 —— 1978 ▬▬ 1979 ·········

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1978 Tons	YEAR 1978 $000	AUG. 1979 Tons	AUG. 1979 $000	SEPT 1979 Tons	SEPT 1979 $000	Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	270662	11481	32081	1389	10392	442	196383	-19.2
Pulpwood Chips	1819169	34864	149101	2785	109522	2181	1544792	-23.3
Total All Imports	13267526	3926572	1202139	414413	1006605	356776	13517677	2.6
Wood Pulp, Total	4024560	1086438	378171	131137	322757	113030	4327764	10.2
Waste Paper	69440	7253	6724	1027	8017	1252	67951	-5.5
Other Fibrous Materials	56093	16854	5476	1388	3587	996	48568	-19.0
Paper,Paperbd&Products,Total	9117433	2816028	811768	280861	672244	241498	9073395	-0.4
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9024340	2640421	803430	261746	663968	221033	8977889	-0.5
Paper, Total	8591929	2562762	759611	253576	624050	213257	8513034	-1.0
Newsprint	7483720	2111648	634156	197721	533367	172007	7150459	-4.8
Printing & Writing	958157	385371	112476	48663	79435	35100	1196340	25.4
Uncoated Groundwood	521602	177010	82604	30919	57646	21519	810807	62.8
Uncoated Book	203204	78744	9460	4674	6516	3360	149754	-30.6
Coated Print.& Impres. Pap	213658	109204	16532	9547	11644	6941	197858	-10.9
Bristols	618	427	170	92	96	56	2546	329.1
Writing and Similar Paper	11748	14284	2302	2335	1677	1720	20297	108.7
Thin (except Cigarette)	7327	5703	1407	1096	1856	1505	15078	95.9
Total Pkg & Other Paper	138132	59377	11032	6087	9765	5320	148006	16.6
Unbleached Kraft Paper	64623	19296	5126	1988	4359	1683	70848	21.2
Other Pkg. & Indust. Paper	73509	40081	5906	4099	5406	3637	77158	12.7
Tissue	11920	6366	1947	1105	1483	830	18229	67.9
Paperboard, Total	100102	18283	6723	1651	6243	1497	76341	-23.6
Test or Containerboard	31860	5185	1381	401	2141	547	19226	-41.6
Semi-Chemical Corrugating	48027	7412	3316	566	2737	491	34866	-24.1
Other Paperboard	20215	5685	2026	684	1365	459	22249	5.7
Wet Machine Board	2717	1497	215	172	135	99	2361	-18.1
Construction Paper & Bd. *	329593	57879	36881	6347	33540	6180	386154	22.3
Building Paper	271870	47017	32726	5450	29374	5278	334988	30.2
Insulating Board	25392	4997	1704	381	1746	353	22087	-12.9
Other Building Board	32331	5865	2452	517	2419	549	29079	-12.4
Convtd Paper&Paperbd Products	93093	175607	8338	19115	8276	20465	95505	5.8
Paper Products, Total	86791	164651	7853	18217	7796	19428	89726	7.1
Paperboard Products, Total	6302	10956	485	898	480	1037	5779	-10.9
Notes								
Other: No Weight Avail. ($000)		78967		7723		7786	82178	6.2
Total Imports Incl. Other($000)		4005539		422135		364561	4662831	18.1

EXPORTS

	YEAR 1978 Tons	YEAR 1978 $000	AUG. 1979 Tons	AUG. 1979 $000	SEPT 1979 Tons	SEPT 1979 $000	Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cu. ft.)	218270	8960	12466	545	14979	700	293301	34.2
Pulpwood Chips	3617574	156779	377408	17537	448708	20773	4432835	21.5
Total All Exports	7659628	2571426	729657	278520	792309	301894	8639379	12.7
Wood Pulp,Total	2598952	817102	247042	94904	274597	104620	2833041	7.4
Cotton Pulp and Other Pulp	88481	47987	8409	4596	9635	5827	125423	50.1
Waste and Old Paper	1599449	145884	191141	22915	169490	20788	2098516	33.7
Paper, Paperbd&Products, Total	3372746	1560452	283065	156105	338587	170658	3582399	6.1
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	2895732	1108079	233691	105946	291290	122752	3032206	4.3
Paper, Total	542675	415574	46336	40454	49893	42697	542732	-1.9
Newsprint	82454	29947	3320	1611	4258	2141	53841	-41.7
Printing & Writing	266096	208801	24493	19933	23064	20357	274386	3.3
Uncoated Groundwood	58109	37154	7695	5194	7309	5224	82658	62.7
Clay Coated Paper	73592	54358	7131	5202	6709	5188	73071	0.0
Uncoated Free Sheet	84896	66185	5071	5246	4626	4864	65565	-28.0
Other Printing & Writing	49500	51103	4596	4292	4420	5082	53092	4.9
Total Pkg. & Other Paper	172995	159013	16218	16726	19496	16924	186571	7.2
Unbleached Kraft	45442	17440	2040	1305	4604	2132	50297	10.0
Other Pkg. & Indust. Paper	127553	141573	14178	15422	14892	14792	136273	6.2
Tissue	21130	17814	2305	2183	3075	3274	27934	32.1
Paperboard, Total	2281653	662216	182106	63317	236821	77746	2425985	6.4
Solid Wood Pulp	2078118	576605	169976	58178	222839	71511	2253089	8.4
Total Linerboard	1539510	344110	110116	30601	166185	44588	1614835	4.6
Bleached Kraft Linerboard	194421	50671	11452	3406	13829	4329	183375	-11.0
Unbleached Kraft Linerbd	1345089	293439	98664	27196	152356	40259	1431461	7.0
Other Unbleached Kraft	65833	22330	11327	3258	10655	3436	96001	43.2
Other Bleached Kraft	440724	204423	47466	23971	45590	23292	528295	22.5
Semi-Chemical Corrugating	32051	5742	1068	348	410	196	13958	-61.9
Recycled Paperboard	203535	85611	12130	5139	13981	6235	172896	-14.3
Wet Machine Board	7554	4805	667	425	498	323	7711	15.8
Construction Paper & Bd. *	63850	25485	4582	1750	4078	1987	55778	-14.2
Building Paper	37166	13220	3127	1116	2246	1047	34334	-3.4
Insulating Board E	26684	12265	1455	634	1832	940	21444	-27.3
Convtd Paper&Paperbd Products	477014	452373	49374	50160	47297	47906	550193	17.3
Paper Products, Total	274884	326728	30258	35960	29906	34900	326622	19.5
Paperboard Products, Total	202130	125645	19116	14200	17390	13006	223571	14.1
Notes								
Other: No Weight Avail. ($000)		7523		992		845	8394	16.5
Total Exports Incl. Other($000)		2578949		279512		302739	3199704	26.0
* Hard Pressed Board (not in total)								
Imports of Hard Pressed Board	295729	40483	18881	2750	26186	3912	259557	-14.7
Exports of Hard Pressed Board	25571	8541	4011	1353	3835	1114	34520	35.4

SOURCE: Bureau of Census, U.S. Department of Commerce.   E - Estim. of tonnage based on square foot data.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR							
	1977	1978	MAY 1979	JUNE 1979	JULY 1979	AUG. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
					R	P		
PAPER								
Newsprint	3525	3535	328	293	291	315	3648	2.6
Uncoated Groundwood Papers	1578	1525	134	146	130	143	1670	9.7
Coated Papers	4189	4514	398	368	386	418	4648	2.3
Uncoated Free Sheet (1)	6914	7358	637	632	585	663	7473	0.5
Cotton Fiber Paper (1)	118	119	12	11	9	11	129	12.6
Thin Papers	362	354	34	32	29	33	382	7.7
Bleached Bristols	1034	1094	99	97	84	101	1125	2.4
Tissue Paper	4262	3957	376	363	356	381	4332	5.4
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3980	3887	338	327	313	323	3839	-6.3
Other Paper (1)	1529	1385	156	154	137	160	1765	24.2
TOTAL PAPER GRADES	27491	27729	2511	2422	2319	2548	29010	2.7
PAPERBOARD								
Solid Wood Pulp Furnish	21689	21536	1973	1945	1874	1989	22844	5.8
Unbleached Kraft Linerboard	12880	13127	1173	1172	1132	1206	13776	4.7
Other Unbl. Kraft Paperboard	820	880	94	96	90	88	1059	19.4
Bleached Kraft Paperboard	3851	3604	350	326	317	349	3868	6.1
Semi-Chemical Paperboard	4139	3924	357	352	336	346	4140	6.5
Recycled Paperboard	7036	7187	616	598	513	614	7140	-0.9
TOTAL PAPERBOARD GRADES	28725	28723	2590	2542	2387	2603	29984	4.1
WET MACHINE BOARD	128	142	15	15	10	16	167	17.5
CONSTR. PAPER & INSUL. BOARD	3286	3374	302	291	254	297	3384	0.4
TOTAL ALL GRADES [Excl. H.P.B.]*	59630	59967	5418	5270	4971	5464	62546	3.3

WHOLESALE PRICE INDEXES

1967 = 100

	1977	1978	JULY	AUG.	SEPT	OCT.		
Pulp, Paper and Products	186.4	195.6	218.1	221.9	222.8	227.2	216.5	11.7
Pulp, Paper & Products, except Waste Paper ♦	186.4	195.6	218.3	222.2	223.1	227.5	216.8	11.8
Total Wood Pulp	281.1	266.5	321.2	322.5	322.5	339.4	310.6	17.9
Total Paper	194.3	206.1	228.4	229.6	230.6	239.0	227.0	11.1
Total Paper, exc. Newsprint	187.3	199.4	222.1	223.7	225.0	231.3	220.7	11.8
Newsprint	215.5	226.3	247.7	247.7	247.7	262.1	245.9	9.1
Total Paperboard	176.5	179.6	201.5	205.0	209.5	211.2	199.6	12.0
Total Paper and Paperboard ♦	188.7	197.8	220.0	221.9	224.0	230.3	218.4	11.4
Converted Products	176.5	186.5	208.3	213.7	213.9	216.5	207.4	12.4
Waste Paper	187.2	191.2	207.9	206.6	206.7	206.7	203.8	6.7
All Commodities	194.2	209.3	236.6	238.1	241.7	245.2	232.8	12.0
Industrial Commodities	195.1	209.4	237.2	240.3	243.8	248.5	233.2	12.1

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. ♦ Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Wholesale Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

total tonnage exports of paper and allied products rose 12.7% in the first nine months of 1979, the dollar value, at a $3.2 billion per year rate, rose 26%.

Imports, by way of contrast, declined sharply from the July-August rate in September, bringing the year-to-date total below the corresponding 1978 level. While declines were recorded in several printing paper grades, imports of uncoated groundwood paper for the nine-month period remained above 800,000 tons per year, for a 63% gain over the corresponding 1978 figure.

Capital Expenditures

Capital expenditures in the paper industry in 1979, as noted here earlier, are forecast at $4.79 billion, according to the Department of Commerce, with the rate in the fourth quarter exceeding $5 billion per year. McGraw-Hill Corporation, in its recently published survey of capital expenditures plans, reports that paper industry capital expenditures in 1980 will rise 19% from the 1979 level. This percentage increase applied to the 1979 Commerce estimate suggests a 1980 figure of $5.7 billion.

The 19% increase in capital expenditures by paper and pulp companies projected by McGraw-Hill for 1980, ranked among the highest for the separate industries reported. It compared, for example, to a 14% increase for all non-durable goods companies, a 13% increase for all manufacturing companies, and a 9.5% increase for all business generally. McGraw-Hill pointed out that business expected the rate of increase in the cost of all capital equipment to match the rate of increase in capital expenditures, so that in real terms, the increase in total U.S. expenditures on plant and equipment would be zero.

Among all the industries listed, only expenditures by aerospace companies, scheduled to rise 22%, and non-ferrous metal companies, up 27%, exceeded the expected gain in paper company expenditures, while those for iron and steel companies just matched paper's 19%.

The API Capacity Survey indicates that the industry will increase its rate of additions to paper and paperboard capacity from 1.5 million tons in 1979 to about 2 million tons in 1980, and wood pulp capacity from 1 million tons to about 1.5 million tons. Thus, outlays for new capacity are not the main factors in the capital expenditures increases for the industry. The money is being spent on modernization of existing plant and equipment, new converting capacity, new pollution abatement and other government mandated facilities. Some may be finding its way into investments by paper companies in other industries. These figures do not include expenditures on land or purchases of existing plant and equipment by one company from another.

Continued on Page 12

Continued from Page 11

The gain in capital expenditures projected by McGraw-Hill was foreshadowed by Conference Board data on capital appropriations, which showed that the annual rate of capital appropriations in the first half of 1979 by those paper companies included in the 1,000 largest corporations in the U.S. were nearly twice their year-ago rate.

The National Council of the Paper Industry for Air and Stream Improvement recently published data on paper industry environmental protection expenditures for the 1978-1979 period. The survey showed that in 1978 the paper industry spent $363 million on pollution abatement equipment, which accounted for 16% of the total capital expenditures of the primary industry. The study showed that such expenditures had reached a peak of 38% of capital expenditures at primary mills in 1972, and as recently as 1976 accounted for 29% of the total. The report further showed that at the present time industry plans to spend $303 million for environmental protection capital equipment in 1979. These figures reflect the completion of programs to meet the 1977 water standards; the industry is still uncertain over the specifics of the 1984 water standards and their cost.

Earnings

Sales and earnings of paper and allied products companies confirm the strength in total paper and paperboard production. Data for 31 paper and allied products companies show third quarter 1979 sales at a record high of $9.02 billion, 14.3% over the year-earlier quarter. Earnings of these companies, at $556 million, were 35% over the year-earlier quarter. For the entire three quarter period, sales were up 13%, earnings 34%. The 1979 margin on sales was 6.6% compared to 5.6% a year earlier.

A similar pattern was shown by 11 paper related companies. These include companies with major operations in the paper industry, but which have most of their sales in some other industry. For these companies, sales in the first three quarters of 1979 were up 18% from their year-ago level, earnings up 25%. The margin on sales for these companies went from 5.5% in 1978 to 5.8% in 1979.

Sales of the 31 paper companies in the second quarter were equivalent to about 64% of the total sales reported for paper and allied products companies by the Federal Trade Commission. Earnings, however, accounted for 70% of total industry earnings.

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

November 19, 1979

	PRODUCTION (000 TONS)					
	Oct. 1979	Sept 1979	Oct. 1978	Jan - Oct. 1979	 1978	% Change 79/78
PAPER GRADES	P	R				
Newsprint	350	340	327	3367	3138	7.3
Uncoated Groundwood (s)	125	119	116	1221	1081	13.0
Coated Paper (s)	398	364	391	3755	3735	0.6
Uncoated Free Sheet Paper (s)	685	631	622	6544	6044	8.3
Thin Paper (c)	33	32	30	320	295	8.4
Cotton Fiber Paper (s)	12	10	10	105	95	11.0
Bleached Bristols (c)	94	88	94	932	913	2.1
Tissue Paper	390	368	361	3810	3544	7.5
Unbleached Kraft Packaging & Indl. Converting (s)	350	319	320	3328	3282	1.4
Other Paper (c)	165	150	114	1492	1201	24.2
TOTAL PAPER	2603	2423	2383	24873	23326	6.6
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1251	1142	1143	11707	11114	5.3
Other Kraft Paperboard	101	89	83	1040	997	4.3
Semichemical Paperboard	403	387	393	3949	3715	6.3
Bleached Paperboard	343	318	348	3359	3377	-0.5
Recycled Paperboard	675	622	666	6416	6280	2.2
TOTAL PAPERBOARD	2773	2558	2634	26470	25483	3.9
CONSTRUCTION & WET MACH GRADES(c)	304	289	307	2961	2935	0.9
TOTAL PAPER AND PAPERBOARD	5679	5269	5323	54304	51744	4.9
HARD PRESSED BD.[not in total](c)	200	175	190	1807	1854	-2.5

WOOD PULP (ALL GRADES)	Sept 1979	Aug. 1979	Sept 1978	Jan - Sept 1979	 1978	% Change 79/78
Dissolving & Special Alpha	109	155	93	1102	1103	-0.1
Bleached Sulphite	127	119	98	1012	1148	-11.8
Unbleached Sulphite	32	35	29	298	235	27.1
Bleached & Semi-Bl. Sulph.	1453	1597	1397	13495	12856	5.0
Unbleached Sulphate	1602	1658	1580	14722	14267	3.2
Semichemical	397	441	329	3545	3004	18.0
Groundwood and Thermo-Mechanical	369	387	360	3344	3258	2.6
TOTAL PULP DIVISION DATA	4087	4393	3886	37518	35870	4.6
Defib. Exploded & Scrngs E	254	285	255	2357	2373	-0.7
TOTAL WOOD PULP PRODUCTION	4342	4678	4141	39875	38243	4.3

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments R - Revised E - Estimate
P - Preliminary (c) - Census Data - Production, last 2 months estimated.

November 21, 1979

	Full Year		INDUSTRY DATA			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1977	1978	August	September	October		
Total Production (API).......| |...	59778	61632	5701	5269	5679	65165	4.9
Total Seasonally Adjusted....| excluding |...			5451	5465	5351	64588	4.9
Imports (including Products).|hard pressed|..E	7432	9117	812	[illegible]	700	9006	-2.1
Exports (including Products).| board |..E	3230	3373	283	389	300	3584	5.6
Apparent Consumption.........| |...	63980 a	67376b	5980	5748	5751	70009	3.9
Paper Production % Tonnage Capacity...........	91.9 g	91.7g	97.2	92.4	95.8	95.8gh	—
Paperboard Production % Tonnage Capacity......	90.9 g	92.7g	93.9	90.0	95.5	94.0g	—
			July	August	September		
MARKET WOOD PULP PRODUCTION - Tons (000)........	4819	5165	487	516	483	5598	7.3
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	46652	47662	4092	4393	4087	50024	4.6
WOOD PULP IMPORTS - TONS (000)..................	3864	4025	352	378	323	4328	10.2
WOOD PULP EXPORTS - TONS (000)..................	2640	2599	279	247	275	2833	7.4
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			July	August	September		
Wood Pulp..(k)................................	47596	48777	4154	4462	4130	51033	4.6
Waste Paper....(d)............................	14058	14600	1122	1295	1219	14931	2.5
Other (Census)...............................E	745	666	45	55	50	651	-2.6
Total................	62399	64043	5321	5812	5399	66614	4.1
..WOOD PULP - NON PAPER.......................E	876	884	77	82	78	927	7.0
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	74807	77290	6469	6644	6448	79577	2.1
EMPLOYMENT (000)			August	September	October		
Paper and Allied Products..........Total......	691.6	700.9	723.3	718.4	718.3	714.0	1.9
Pulp, Paper and Board Mills........Total.....E	272.3	267.0	277.4	274.0	274.0	271.2	1.3
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products......................	5.96	6.52	7.22	7.31	7.36	7.05	9.0
Pulp, Paper Mills...........................E	6.75	7.44	8.41	8.55	8.60	8.16	10.6
Paperboard Mills............................E	6.94	7.68	8.48	8.74	8.80	8.31	9.5
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q2	1979 Q3	1979 Q4		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)#	3.36	3.46	4.80	4.68	5.14	4.79	38.4
INDEX OF OUTPUT PER MAN-HOUR (1967=100)..........			June	July	August		
|IN PULP, PAPER |...Production Workers.......RS	148.1	153.9	156.7	154.5	155.9	157.5	3.4
|AND BOARD MILLS|...All Employees............RS	144.0	148.4	151.4	149.2	150.3	151.7	3.0
PAPER AND ALLIED PRODUCTS (Million $)			July	August	September		
Industry Shipments (Dept. of Commerce)#........	52368	57654	5659	5663	5823	65923	16.1
Pulp, Paper and Paperboard#...................	23701	25343	2541	2586	2574	29784	19.0
Inventories (End of Period) - Total Industry#.	5628	5875	6464	6358	6483	6483	11.0
Pulp, Paper and Paperboard#.................	2102	2006	2110	2148	2163	2163	7.9
			1978 Q4	1979 Q1	1979 Q2		
Sales (Corporations Only, FTC).................	45750	48982 RS	12841	12997	13828	53650	12.9
Earnings (Corporations Only, FTC)..............	2367	2598 RS	734	867	917	3568	42.7
Depreciation (Corporations Only, FTC)..........	1663	1726 RS	445	447	479	1852	10.5
Net Worth (Corporations Only, FTC).............	19704	20794 RS	20794	21282	21808	21808	9.9
PRICE INDEXES (Bureau of Labor Stats)1967=100			August	September	October		
Total Pulp, Paper and Allied Products..........	186.4	195.6	221.9	222.8	227.2	216.5	11.7
Wood Pulp......................................	281.1	266.5	322.5	322.5	339.4	310.6	17.9
Waste Paper....................................	187.2	191.2	206.6	206.7	206.7	203.8	6.7
Paper..	194.3	206.1	229.6	230.6	239.0	227.0	11.1
Paperboard.....................................	176.5	179.6	205.0	209.5	211.2	199.6	12.0
PAPER DEMAND (INDEXED: 1967=100)			August	September	October		
Total Paper Production #.......................	131.0	133.1	147.1	143.7	142.0	142.0	6.7
Paper New Supply #............................	124.0	131.2	143.6	134.8	137.8	137.6	4.6
Total End - Use Index #.....................	134.4	139.5	145.3	145.1	144.2	144.4	4.0
Production of Nondurable Goods #...(19%)..	150.5	157.0	164.4	164.3	164.8	163.1	4.4
Disposable Income (Constant $) #...(23%)..	138.6	145.2	148.5	147.7	142.1	147.9	2.4
Total Printing and Publishing #...(58%)..	127.6	131.5	137.7	137.7	138.2	137.0	4.6
Trend Factor	-------------------------	-------------------------	----Not	Available----	-------------------------	-------------------------	-------------------------
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production #.................	127.0	132.8	136.2	140.4	136.0	137.4	3.9
Production for Domestic Use	271.3	227.3	133.7	139.5	133.8	135.7	3.9
Total End - Use Index #.....................	141.6	147.7	150.5	151.5	151.9	151.8	3.4
Production of Consumer Goods #...(60.49%)	145.3	149.1	148.3	149.8	150.3	150.7	1.4
Production of Equipment #...(6.62%)	123.0	132.8	141.6	142.9	142.0	141.5	7.4
Production of Materials #...(32.89%)	138.6	148.3	156.3	156.4	156.8	156.0	6.3
Trend Factor	-------------------------	-------------------------	----Not	Available----	-------------------------	-------------------------	-------------------------
NEWSPRINT MARKETS			July	August	September		
Consumption by Publishers - Tons (000)........	10228	10872	866	914	949	10996	4.2
Newspaper Pub. and Printing Emp. Total (000)..	395.6	407.4	422.5	421.6	421.8	418.4	3.1
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	106489	115317	8068	7596	10803	112613	4.8
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	15482	17586	1585	1777	1583	19395	12.5
Inventories (End of Period)	1261	1482	1608	1604	1672	1672	18.2
Paper Only............................Sales	11799	13078	1192	1327	1190	14699	15.2
Inventories (End of Period)	873	1025	1079	1055	1093	1093	12.0
RETAIL TRADE (Million $)			August	September	October		
Total Retail Sales #..........................	724020	798818	74794	76745	75452	874159	10.8
Nondurable Goods Stores Sales #..............	476188	520902	48854	49873	49797	571358	10.8
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)#.	138.2	146.1	151.6	152.3	152.5	151.2	4.2
WHOLESALE PRICES(ALL COMMODITIES)(INDX 1967=100)	194.2	209.3	238.1	241.7	245.2	232.8	12.0
			July	August	September		
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	181.5	195.4	218.9	221.1	223.4	214.1	10.8
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	230.8	275.6	295.1	299.8	303.9	303.9	15.4
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billions$).			1979 Q1	1979 Q2	1979 Q3		
G.N.P. or Expenditure - Current $.............	1899.5	2127.6	2292.1	2329.8	2395.4	2339.1	11.8
G.N.P. OR Expenditure - 1972 $................	1340.5	1399.2	1430.6	1422.3	1434.4	1429.1	2.8

lb/capita	Popul.(mil)
.a - 590	216.8
.b - 617	218.5
.c - 635	220.4

.d - 1977 - 12192; 1978 - 13185
. (000 tons)as pub. by
. U.S. Census Bureau
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for defibrated exploded & screenings. Production was: 1977 - 3,218; 1978 - 3,138 (000 tons)
g - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '77 - 1,688; '78 - 1,655 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
- Seasonally adjusted

A2500-2

MONTHLY STATISTICAL SUMMARY

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No. 57 DECEMBER 1979 No. 12

Current Trends

The rate of paper and paperboard production in November 1979 continued along the high plateau established last Spring. In March, the seasonally adjusted rate of production moved above the 65 million ton per year level and has fluctuated about that rate ever since. It now appears that the total production in 1979 will amount to 64.7 million tons, about 5% above the 61.6 million tons produced in 1978, establishing a new high.

Preliminary data indicate that the rate of paper production slipped a little in November. Among the paper grades, the seasonally adjusted rate of groundwood paper shipments held fairly steady, but both coated papers and uncoated free sheet papers moved downward. The tissue and packaging grades remained close to their September-October levels. If the year-end shutdowns follow their normal pattern, total production of printing/writing papers in 1979 will amount to about 15.4 million tons, some 6% over the 1978 level. On this same basis, newsprint production would total about 4.1 million tons for a 9% gain, and tissue paper production about 4.55 million tons for a gain of nearly 8%.

Paperboard production held up very well in November, with the seasonally adjusted rate moving up a bit from the October level. If the year-end tonnage loss in paperboard production follows the

Continued on Page 2

Continued from Page 1

average pattern of past years, the 1979 total would amount to about 31.4 million tons, about 3.7% above the 1978 level. The largest gains would be in the containerboard grades, consistent with the strong increase in demand for fiber box shipments. Unbleached kraft linerboard production, for example, at 13.9 million tons for 1979 as a whole, would be up 5%, while semichemical paperboard production, at 4.7 million tons, would be up 5.6%. Recycled linerboard is showing a gain of better than 50%, but the tonnage accounts for about 3% of total linerboard. In general, the increase in shipments of boxboard have been fairly small, with the total solid bleached grades, for example, up less than 1%, and total recycled paperboard up about 1-½%.

New Supply

Imports of paper, paperboard and products rose sharply in October to a level of 767,000 tons, but fell short of the 812,000 tons imported in August. Imports of both newsprint and uncoated groundwood papers also rose sharply from the September level but remained below the level reached in August.

For the first ten months of 1979, total imports of paper, paperboard and products were at an annual rate of 9.1 million tons, 1.2% below the corresponding year-ago figure. Newsprint, at 7.1 million tons, was down by 5.6%; part of this decline reflected supply problems in Canada. Imports of groundwood paper, at about 822,000 tons per year, were up by more than 50% from the year-ago level, and compares to a domestic production rate of 1.5 million tons per year.

Exports of paper, paperboard and products in October, at 340,000 tons, was just a little higher than the September level, but nonetheless was second only to the June high of 350,000 tons. For the entire ten month period, exports were 7.3% over the corresponding year-ago total. Linerboard exports continued to show strength, holding close to the September high and for the entire ten month period were 6% over their year-ago total. On a dollar basis, in the January-October 1979 period, exports of wood pulp, other fibers, paper, paperboard and products were at an annual rate of $3.26 billion, up 28% from the corresponding year-ago rate.

We estimate that the total imports of paper, paperboard and products in 1979 will amount to about 9.0 million tons and total exports to about 3.6 million tons. Thus, on a preliminary basis, new supply (production plus imports less exports) will total 70.1 million tons, about 4% over the 67.4 million tons of new supply in 1978. This compares to the 1978-1979 estimated gain in real gross national product of a little under 2%, and about a 4% gain in total industrial

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

	YEAR 1977	1978	AUG. 1979	SEPT 1979	OCT. 1979	NOV. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PAPER					R	P		
Newsprint - Production	3870	3768	360	340	371	365	4094	8.5
- Shipments	3866	3779	358	339	371	365	4092	8.1
Printing & Writing	13865	14545	1381	1257	1396	1286	15517	6.2
Groundwood Paper - Shipments	1331	1309	131	119	133	124	1476	13.0
- New Orders	1336	1367	136	124	139	101	1484	8.4
- Unfilled Orders	137	179	195	204	207	185	185	5.5
Coated Paper - Shipments	4261	4448	405	364	406	376	4515	0.6
- New Orders	4279	4428	399	348	378	389	4520	2.0
- Unfilled Orders	398	404	445	432	408	426	426	18.3
Unctd Free Sheet - Shipments	6777	7225	699	632	708	635	7856	8.3
- New Orders	6833	7542	697	628	678	606	7822	2.9
- Unfilled Orders	436	754	753	756	730	710	710	-5.8
Thin Paper - Production *	362	354	33	31	33	34	385	8.4
Cotton Fiber Paper - Shipments	108	114	11	10	11	11	126	9.9
Bleached Bristols -Production*	1026	1095	102	101	105	106	1159	5.5
Tissue Paper - Production	4286	4215	401	367	395	375	4570	7.8
Total Packaging & Other Paper	5390	5314	495	457	503	465	5736	7.2
Unbl. Kraft Paper - Shipments	3815	3884	337	319	348	325	3982	1.8
Other Paper - Production * ♦	1575	1430	158	138	155	140	1754	21.8
TOTAL PAPER-Production-Unadj.	27411	27842	2636	2421	2665	2491	29917	6.9
-Production-S.A.			2567	2507	2538	2493	29809	6.9
PAPERBOARD - PRODUCTION							♦♦	
Solid Wood Pulp Furnish	21636	22790	2081	1935	2098	2039	[illegible]	4.5
Unbleached Kraft Linerboard	12573	13228	1233	1142	1251	1190	14070	5.1
Production for Export	1290	1466	142	126	141	148	1595	7.6
Other Unbl. Kraft Paperboard	1078	1145	101	89	101	109	1251	6.8
Semichemical Paperboard	4264	4439	406	387	403	398	4742	6.0
Production for Export	122	119	9	6	7	6	94	-22.8
Solid Bleached Paperboard	3721	3979	340	318	343	342	4038	0.2
Production for Export	389	430	38	33	37	38	437	0.8
Recycled Paperboard	7317	7485	670	622	675	631	7689	1.8
Production for Export	30	22	2	1	1	1	18	-16.2
TOTAL PAPERBOARD-Prod.-Unadj.	28953	30275	2750	2558	2773	2669	31790	3.8
- Production - S.A.			2590	2670	2586	2651	31391	3.8
- New Orders	29022	31194	2774	2555	2854	2605	32497	3.0
- Unfilled Orders	1037	1370	1589	1622	1594	1484	1484	9.1
WET MACHINE BOARD *	128	142	17	16	16	15	174	22.3
BUILDING PAPERS *	1850	1956	168	148	155	150	1903	-3.8
INSULATING BOARD *	1435	1417	137	117	130	115	1455	2.8
TOTAL ALL GRADES - Unadjusted	59778	61632	5707	5259	5738	5440	65238	5.0
- Production - S.A.			5457	5456	5407	5430	64699	5.0
HARD PRESSED BD. [not in total]*	2237	2180	194	187	200	175	2176	-1.5

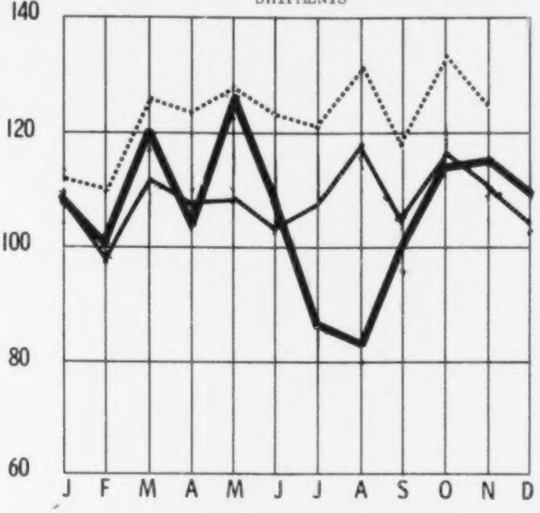
* Census Data - Production. Last two months estimated.
♦ Production excludes API bleached kraft envelope.
♦♦ Includes revisions not available monthly.

S.A. Seasonally Adjusted
P Preliminary
R Revised

THOUSANDS OF TONS

GROUNDWOOD PAPER, UNCOATED

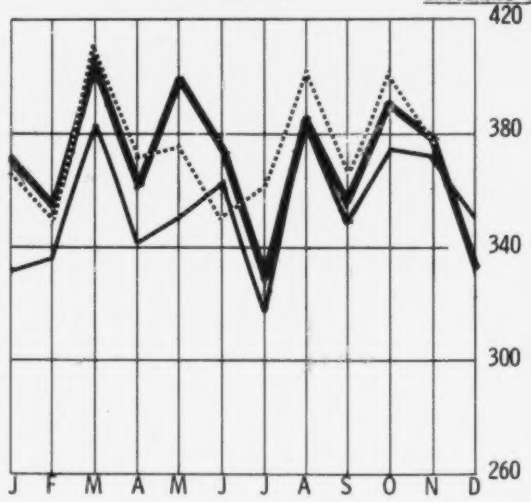
SHIPMENTS



COATED PAPER

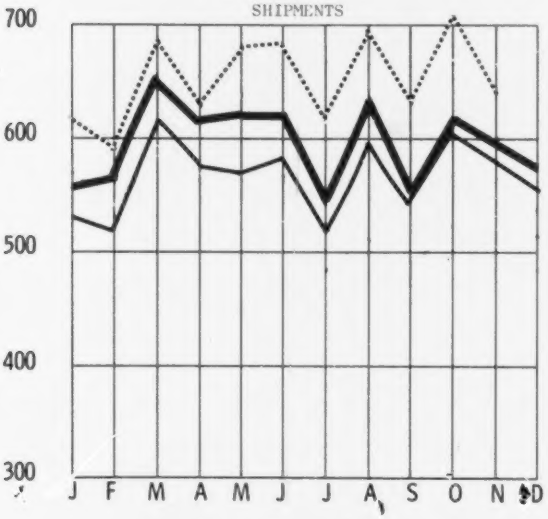
SHIPMENTS

THOUSANDS OF TONS



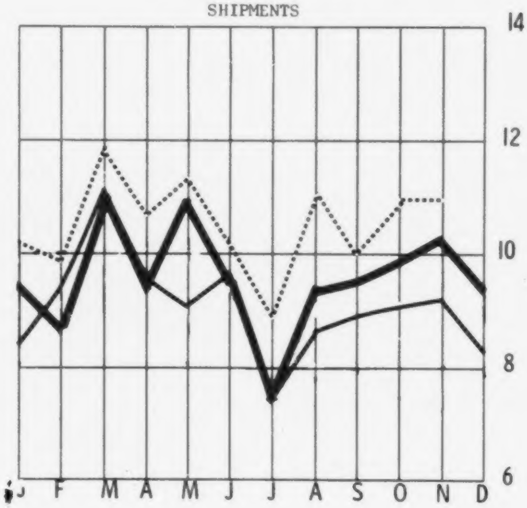
UNCOATED FREE SHEET PAPERS

SHIPMENTS



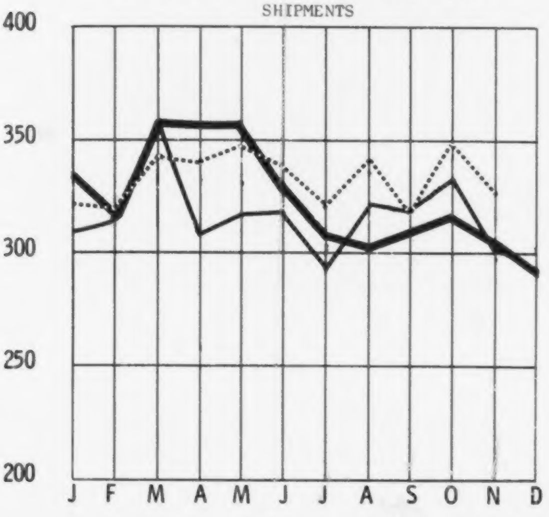
COTTON FIBER PAPER

SHIPMENTS



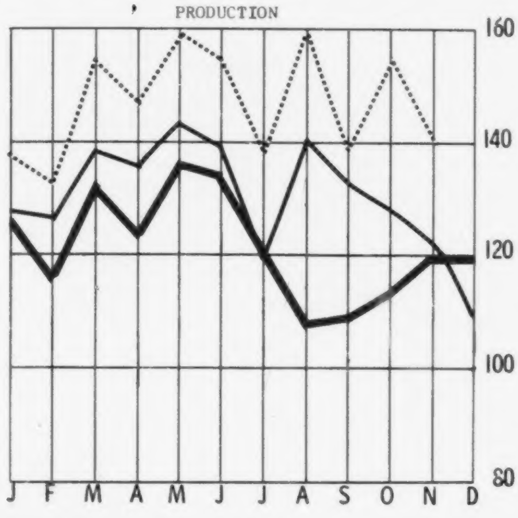
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1977 —— 1978 ━━ 1979 ········

WOOD PULP STATISTICS
(Thousands of Tons)

	YEAR 1977	YEAR 1978	JULY 1979	AUG. 1979	SEPT 1979	OCT. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
TOTAL WOOD PULP (1)					R	P		
Total Wood Pulp - Production	46652	47662	4092	4393	4088	4466	50382	4.8
- Imports	3864	4025	352	378	323	358	4325	9.3
- Exports	2640	2599	279	247	275	265	2867	9.3
- New Supply	47877	49088	4165	4524	4136	4559	51839	5.0
Dissolving Pulp - Production	1467	1411	125	155	109	148	1500	3.7
- Imports	181	189	10	19	24	9	181	6.4
- Exports	796	758	88	71	63	64	747	-5.5
- New Supply	852	842	47	103	69	93	934	13.0
Paper Grades Chemical Pulp - Production	36897	37847	3189	3409	3213	3488	39618	3.7
- Imports	3481	3627	326	331	285	333	3935	9.5
- Exports	1763	1780	187	171	203	193	2053	15.9
- New Supply	38615	39694	3327	3569	3295	3628	41500	3.7
Groundwood and Thermo-Mech. - Production	4403	4373	360	387	370	389	4481	2.6
- Imports	203	208	16	27	14	16	209	8.8
- Exports	81	62	4	4	8	8	67	8.9
- New Supply	4525	4519	371	410	375	396	4622	2.8
Semi-Chemical - Production	3886	4031	419	441	397	442	4783	18.5
- Imports	0	0						
- Exports	0	0	------	Included	with	Groundwood	Pulp	------
- New Supply	3886	4031	419	441	397	442	4783	18.5
MARKET WOOD PULP								
Total Market Wood Pulp - Production	4819	5165	487	516	482	532	5675	8.1
- Imports	2684	2816	247	240	226	251	3056	9.4
- Exports	2359	2480	243	238	287	231	2727	8.5
- New Supply	5144	5501	490	517	421	551	6004	8.6
Dissolving Pulp - Production	1465	1406	125	155	108	147	1500	4.1
- Imports	256	291	19	29	28	12	316	13.8
- Exports	798	824	65	93	87	63	848	1.1
- New Supply	923	873	79	91	49	97	968	10.0
Paper Grades Chemical Pulp - Production	3263	3675	357	354	367	378	4116	10.5
- Imports	2394	2495	228	210	198	237	2733	9.7
- Exports	1515	1613	175	141	198	164	1834	12.3
- New Supply	4143	4557	409	423	368	452	5014	9.4
Groundwood Pulp and All Other - Production	90	83	5	6	7	6	59	-27.2
- Imports	35	26	1	1	0	2	7	-66.1
- Exports	46	42	3	4	2	4	45	5.6
- New Supply	80	67	3	3	5	3	22	-64.2

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1977 - 3218; 1978 - 3155;A.R.Y-T-D'79 - 3216
SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

FIBROUS RAW MATERIALS
(Thousands of tons)

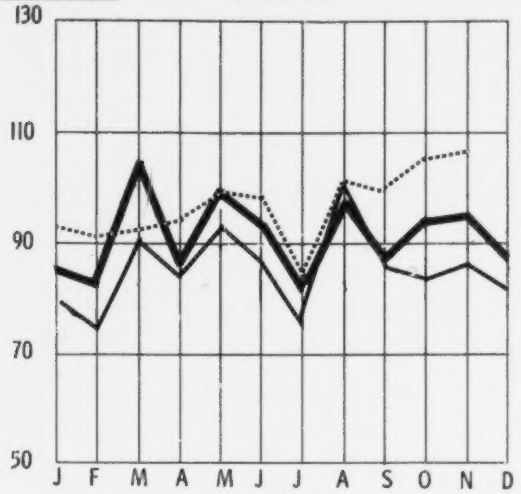
CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	62399	64043	5321	5816	5440	5711	66859	3.9
Total Wood Pulp (2) A	47596	48777	4154	4465	4169	4301	51140	4.3
Market Wood Pulp A	4216	4774	409	418	399	440	5068	6.2
Waste Paper (3) A	14058	14600	1122	1295	1219	1355	15063	2.8
Rags, Straw & Other C, E	745	666	45	56	52	55	655	-2.5
INVENTORIES								
Wood Pulp at Pulp Mills A	193	130	118	122	114	112	112	-27.2
Market Pulp at Pulp Mills A	277	187	178	166	146	152	152	-29.9
Mkt Pulp at Ppr.& Bd. Mills CE	404	435	440	438	390	400	400	-8.6
Waste Ppr.at Ppr.&Bd. Mills CE	728	740	662	636	665	675	675	-9.9
Rags, Straw and Other at Paper and Board Mills C, E	67	66	69	61	65	70	70	6.1
Mkt Wood Pulp Days of Supply A	55	44	41	42	37	36	36	-17.5
Wood Pulp Consumption at at Non-Paper Mills C, E	876	884	77	76	70	75	908	4.3

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.: 1977 - 1,688,000; 1978 - 1,655,000 ton
(3) Census Waste Paper Consumpt.(000 tons): 1977 - 12192; 1978 - 13185; 1979(Annual Rate Jan-Sept) 12965

BLEACHED BRISTOLS

PRODUCTION

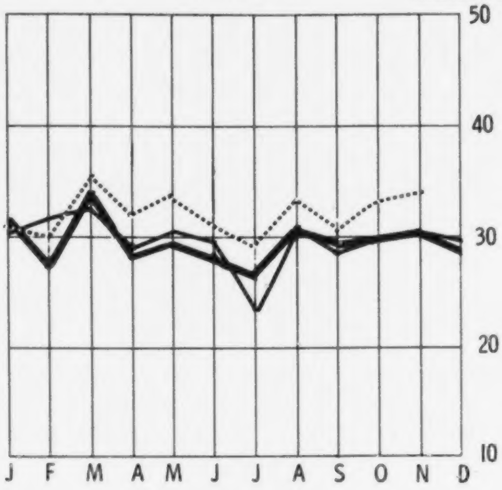
THOUSANDS OF TONS



THIN PAPERS

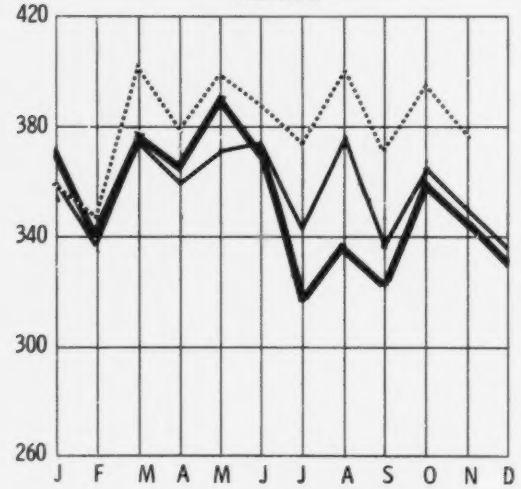
PRODUCTION

THOUSANDS OF TONS



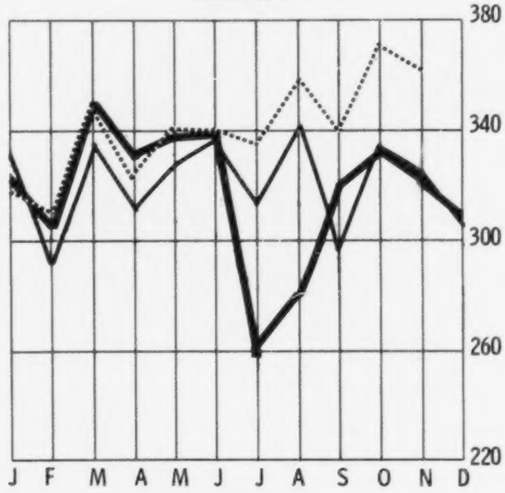
TISSUE PAPER

PRODUCTION



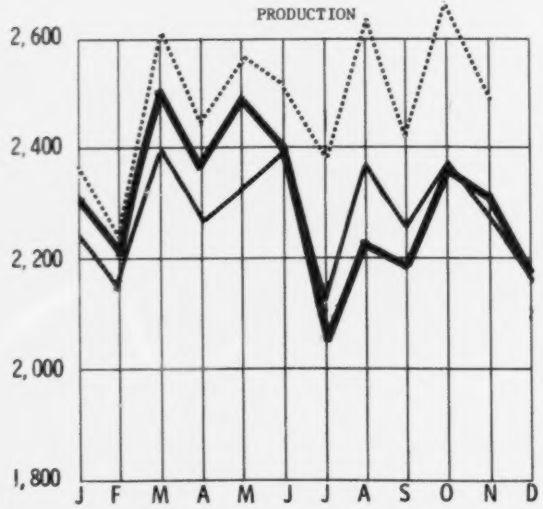
NEWSPRINT

PRODUCTION



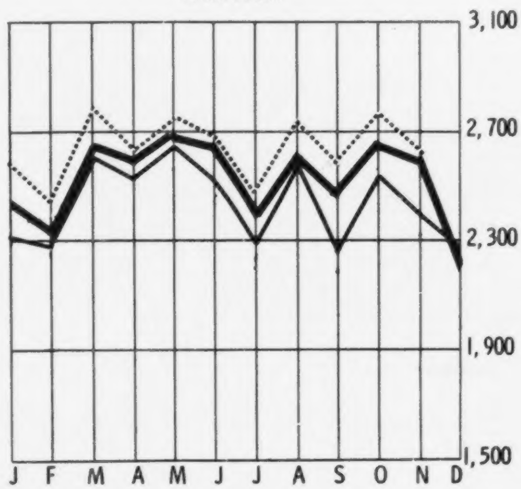
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1977 ——— 1978 ━━━ 1979 ·········

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1977	YEAR 1978	JULY 1979	AUG. 1979	SEPT 1979	OCT. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	74034	77025	6505	6955	6465	7505	78707	2.0
	- Total Consumpt.	74807	77290	6469	6644	6448	7103	80143	2.8
	- Residues *	30112	30369	2418	2707	2444	2915	30658	0.1
	- Inventories	6187	6244	4558	4847	4943	5320	5320	-9.8
So. Atlantic	- Total Receipts	23727	25353	2235	2224	2080	2393	26185	3.3
	- Total Consumpt	23820	25204	2353	2158	2194	2385	26819	5.5
	- Residues *	7880	8513	745	766	698	807	8960	5.0
	- Inventories	1003	1191	859	972	894	911	911	-6.1
Northeast	- Total Receipts	5954	6664	599	656	611	649	7417	12.4
	- Total Consumpt	6250	6607	558	625	554	661	7570	15.5
	- Residues *	1426	1662	118	158	129	143	1692	1.5
	- Inventories	584	770	597	625	684	680	680	-0.7
South Central	- Total Receipts	24367	25572	2136	2332	2157	2568	26701	5.2
	- Total Consumpt	24394	25678	2094	2232	2096	2308	26735	4.1
	- Residues *	8415	8418	664	721	673	787	8878	5.4
	- Inventories	1279	1194	787	874	979	1243	1243	16.8
North Central	- Total Receipts	4996	5291	495	539	480	518	5531	5.4
	- Total Consumpt	5261	5330	409	453	438	448	5557	4.4
	- Residues *	1430	1456	130	131	126	142	1495	5.7
	- Inventories	1029	968	709	786	832	885	885	-6.2
West	- Total Receipts	14990	14145	1040	1204	1137	1377	12872	-11.9
	- Total Consumpt	15082	14471	1055	1176	1166	1301	13463	-10.0
	- Residues *	10961	10320	761	931	818	1036	9632	-9.1
	- Inventories	2292	2121	1606	1590	1554	1601	1601	-28.3

* - Consumption of Residues in Cord Equivalents.

SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

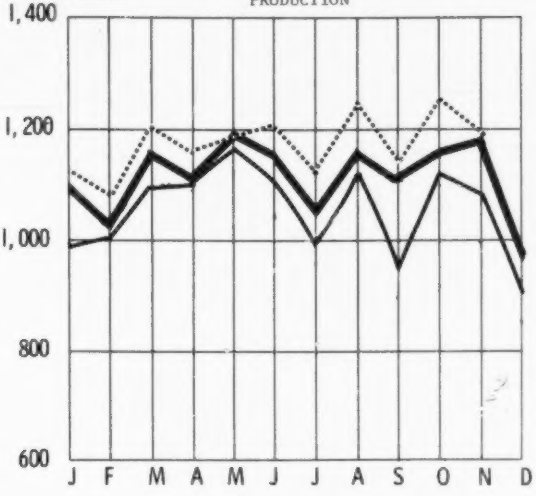
IMPORTS FROM CANADA

	YEAR 1978 Tons	YEAR 1978 $000	SEPT 1979 Tons	SEPT 1979 $000	OCT. 1979 Tons	OCT. 1979 $000	Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	267517	11155	10392	442	26097	1139	208061	-15.8
Pulpwood Chips	1817114	34737	109522	2180	173509	3555	1542089	-18.4
Wood Pulp, Total	3847590	1041860	294506	103803	358021	128032	4146388	9.3
Waste Fibrous Materials, Total	99872	13581	10485	1723	3326	549	92265	-11.2
Paper,Paperboard&Products,Total	8666058	2496771	644801	213963	717606	241702	8451271	-3.2
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8625089	2454161	641094	208350	713399	236555	8407439	-3.3
Paper, Total	8209265	2382065	603076	201215	669161	228189	7957850	-3.8
Newsprint	7477824	2108925	531372	171088	576311	187537	7003346	-7.3
Printing,Writing & Rel.Pap.	592897	215790	61256	24757	81148	34298	813912	39.8
Pack. & Ind. Conv. Paper	126672	50896	8762	4282	9710	4987	119344	-3.0
Special Industrial Paper	556	595	210	269	305	388	3140	643.6
Tissue Paper	11315	5860	1476	819	1688	979	18107	61.2
Paperboard, Total	97162	16488	6119	1361	7381	1616	75903	-22.4
Wet Machine Board	1437	758	63	35	197	88	1563	7.3
Construction Paper and Bd. *	317225	54849	31836	5739	36660	6662	372123	16.8
Convtd Paper&Paperbd Products	40970	42611	3707	5613	4206	5147	43831	13.6
EXPORTS TO CANADA								
Pulpwood, Roundwood (in cords of 128 cubic feet)	216233	8823	14887	698	14933	629	281466	29.3
Pulpwood Chips	89406	4695	5097	205	8707	210	100038	12.3
Wood Pulp, Total	98813	32570	13821	4422	9514	3846	135578	38.3
Cotton Pulp & Other Pulp	12291	4437	585	279	298	142	7976	-12.4
Waste Paper	341671	33467	41841	4499	60077	5994	476425	45.7
Paper,Paperboard&Products,Total	667324	356156	53046	29090	53546	32440	630268	-7.7
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	469501	232442	38184	19603	37590	21665	456346	-5.0
Paper, Total	196765	143884	17342	12076	15909	13254	180064	-11.1
Newsprint	2368	1794	113	111	94	96	3020	29.3
Printing,Writing & Rel.Pap.	115565	80005	9858	6826	10774	7815	109829	-8.5
Pack. & Ind. Conv. Paper	28732	13338	1488	871	1563	993	16728	-45.3
Special Industrial Paper	40579	41156	5338	3757	3097	4121	42303	5.4
Tissue	9522	7592	545	511	381	228	8184	-13.1
Paperboard, Total	220964	70738	18669	6589	18991	7032	232817	3.6
Wet Machine Board	4906	2446	392	199	483	296	5548	18.2
Construction Pap. & Bd. E *	46866	15374	1781	740	2208	1084	37917	-21.9
Convtd Paper&Paperbd Products	197823	123714	14862	9487	15955	10775	173922	-14.0
* - Hard Pressed Board (not in total)								
Imports of Hard Pressed Bd.	22803	3622	4366	758	4545	787	28026	17.8
Exports of Hard Pressed Bd.	18926	5216	2007	615	1592	536	22118	13.6

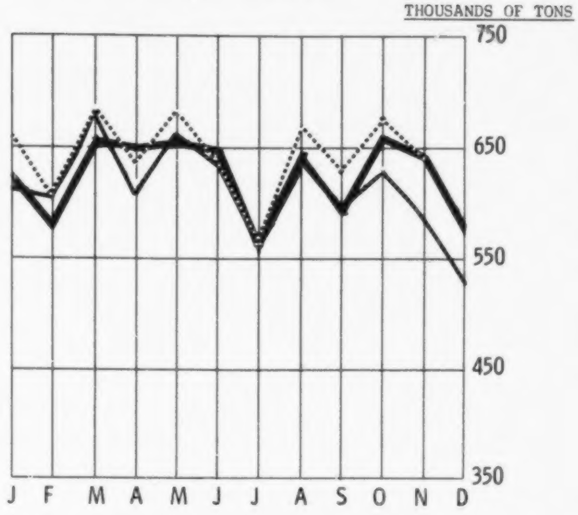
SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

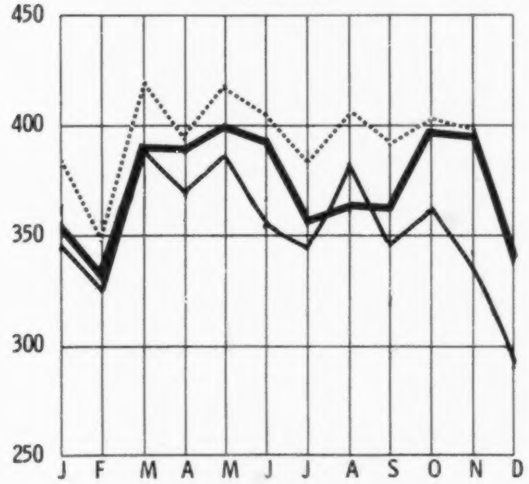


RECYCLED PAPERBOARD



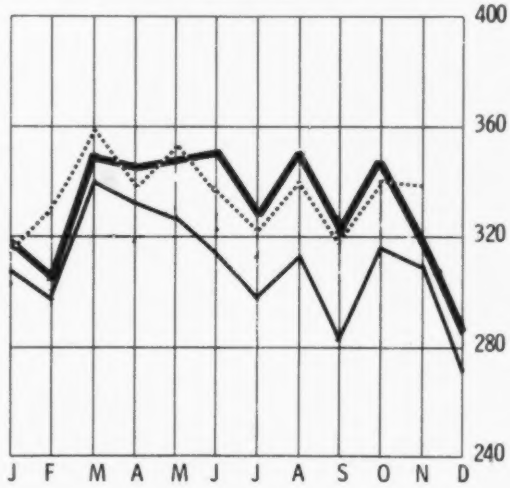
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



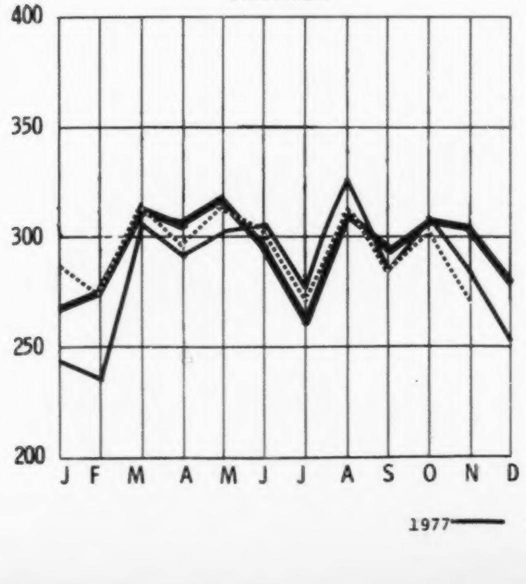
SOLID BLEACHED PAPERBOARD

PRODUCTION



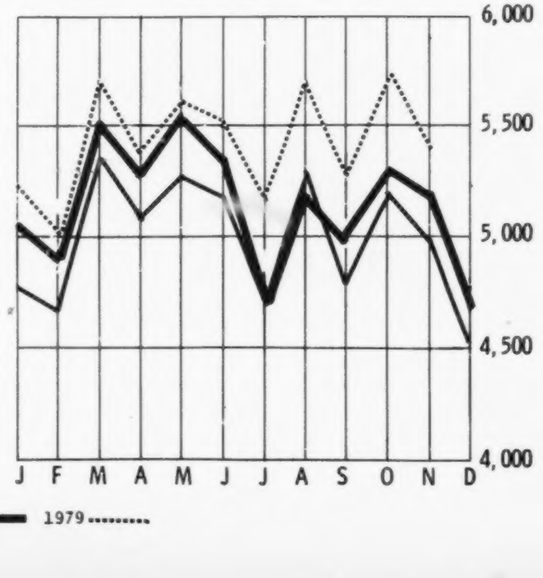
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1977 —— 1978 ▬▬ 1979 ....

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1978		SEPT 1979		OCT. 1979		(1) Annual Rate Y-T-D 1979	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000		
Pulpwood, Roundwood (in cords of 128 cubic feet)	270662	11481	10392	442	26121	1140	208090	-17.0
Pulpwood Chips	1819169	34864	109522	2181	173509	3555	1598524	-16.9
Total All Imports	13267526	3926572	1006605	356776	1129870	410091	13521754	1.8
Wood Pulp, Total	4024560	1086438	322757	113030	358021	130116	4324613	9.3
Waste Paper	69440	7253	8017	1252	1936	209	63479	-13.0
Other Fibrous Materials	56093	16854	3587	996	2851	1048	47132	-18.0
Paper,Paperbd&Products,Total	9117433	2816028	672244	241498	767063	278718	9086531	-1.2
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9024340	2640421	663968	221033	758596	257463	8990416	-1.3
Paper, Total	8591929	2562762	624050	213257	712273	248670	8516457	-1.8
Newsprint	7483720	2111648	533367	172007	590134	192077	7143574	-5.6
Printing & Writing	958157	385371	79435	35100	109397	49367	1207982	25.4
Uncoated Groundwood	521602	177010	57646	21519	76869	29906	821969	60.8
Uncoated Book	203204	78744	6516	3360	12566	6487	149858	-30.5
Coated Print.& Impres. Pap	213658	109204	11644	6941	16662	9778	198066	-9.4
Bristols	618	427	96	56	174	83	2499	351.5
Writing and Similar Paper	11748	14284	1677	1720	2449	2470	21207	109.8
Thin (except Cigarette)	7327	5703	1856	1505	677	643	14383	92.2
Total Pks & Other Paper	138132	59377	9765	5320	11051	6241	146467	8.9
Unbleached Kraft Paper	64623	19296	4359	1683	5196	2082	69998	10.5
Other Pks. & Indust. Paper	73509	40081	5406	3637	5856	4159	76469	7.5
Tissue	11920	6366	1483	830	1691	986	18435	57.8
Paperboard, Total	100102	18283	6243	1497	7426	1664	77617	-23.4
Test or Containerboard	31860	5185	2141	547	2741	656	20592	-39.2
Semi-Chemical Corrugating	48027	7412	2737	491	3411	612	35472	-25.0
Other Paperboard	20215	5685	1365	459	1275	396	21553	7.2
Wet Machine Board	2717	1497	135	99	224	103	2394	-17.4
Construction Paper & Bd. *	329593	57879	33540	6180	38674	7025	393947	19.1
Building Paper	271870	47017	29374	5278	33068	5847	341171	25.3
Insulating Board	25392	4997	1746	353	2160	419	22470	-11.7
Other Building Board	32331	5865	2419	549	3446	759	30306	-8.5
Convtd Paper&Paperbd Products	93093	175607	8276	20465	8467	21255	96115	5.2
Paper Products, Total	86791	164651	7796	19428	7890	19525	90222	6.2
Paperboard Products, Total	6302	10956	480	1037	577	1730	5893	-8.9
Notes								
Other: No Weight Avail. ($000)		78967		7786		6926	82272	4.7
Total Imports Incl. Other($000)		4005539		364561		417017	4696968	18.0

Pulpwood, Roundwood (in cords of 128 cu. ft.)	218270	8960	14979	700	14933	629	281891	28.2
Pulpwood Chips	3617574	156779	448708	20773	348136	16583	4407314	22.3
Total All Exports	7659628	2571426	792309	301894	841784	319462	8785582	14.5
Wood Pulp,Total	2598952	817102	274597	104620	264612	103085	2867272	9.3
Cotton Pulp and Other Pulp	88481	47987	9635	5827	14004	8044	129685	54.8
Waste and Old Paper	1599449	145884	169490	20788	222755	25315	2155970	36.7
Paper, Paperbd&Products, Total	3372746	1560452	338587	170658	340413	183018	3632655	7.3
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	2895732	1108079	291290	122752	289547	128855	3076441	5.5
Paper, Total	542675	415574	49893	42697	56408	47364	556149	0.7
Newsprint	82454	29947	4258	2141	10843	4418	61468	-31.9
Printing & Writing	266096	208801	23064	20357	24821	22512	276732	3.3
Uncoated Groundwood	58109	37154	7309	5224	5950	4578	81532	48.2
Clay Coated Paper	73592	54358	6709	5188	6800	5662	73924	-0.0
Uncoated Free Sheet	84896	66185	4626	4864	7326	6538	67800	-23.2
Other Printing & Writing	49500	51103	4420	5082	4744	5734	53476	5.4
Total Pks. & Other Paper	172995	159013	19496	16924	18079	17958	189608	9.5
Unbleached Kraft	45442	17440	4604	2132	7390	3212	54136	23.8
Other Pks. & Indust. Paper	127553	141573	14892	14792	10689	14746	135473	4.7
Tissue	21130	17814	3075	3274	2666	2475	28339	34.7
Paperboard, Total	2281653	662216	236821	77746	228429	79087	2457501	7.3
Solid Wood Pulp	2078118	576605	222839	71511	209438	71263	2279106	9.4
Total Linerboard	1539510	344110	166185	44588	153807	44506	1637920	6.0
Bleached Kraft Linerboard	194421	50671	13829	4329	17089	5141	185544	-8.4
Unbleached Kraft Linerbd	1345089	293439	152356	40259	136718	39365	1452376	8.2
Other Unbleached Kraft	65833	22330	10655	3436	7173	2449	95007	38.5
Other Bleached Kraft	440724	204423	45590	23292	45527	23426	530098	22.5
Semi-Chemical Corrugating	32051	5742	410	196	2932	883	16081	-55.6
Recycled Paperboard	203535	85611	13981	6235	18990	7824	178395	-14.1
Wet Machine Board	7554	4805	498	323	562	406	7614	8.2
Construction Paper & Bd. *	63850	25485	4078	1987	4149	1998	55179	-15.1
Building Paper	37166	13220	2246	1047	2497	1146	33897	-6.9
Insulating Board E	26684	12265	1832	940	1652	853	21282	-25.6
Convtd Paper&Paperbd Products	477014	452373	47297	47906	50866	54163	556213	17.9
Paper Products, Total	274884	326728	29906	34900	30125	39531	330110	20.8
Paperboard Products, Total	202130	125645	17390	13006	20741	14632	226103	14.1
Notes								
Other: No Weight Avail. ($000)		7523		845		980	8731	15.3
Total Exports Incl. Other($000)		2578949		302739		320442	3264264	28.0
* Hard Pressed Board (not in total)								
Imports of Hard Pressed Board	295729	40483	26186	3912	23687	4157	262026	-12.6
Exports of Hard Pressed Board	25571	8541	3835	1114	2823	917	34456	30.5

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1977	YEAR 1978	JUNE 1979	JULY 1979	AUG. 1979	SEPT 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
					R	P		
PAPER								
Newsprint	3525	3535	293	291	342	308	3690	4.3
Uncoated Groundwood Papers	1578	1525	146	130	141	133	1659	9.3
Coated Papers	4189	4514	368	386	419	374	4630	2.6
Uncoated Free Sheet (1)	6914	7358	632	585	647	612	7438	0.8
Cotton Fiber Paper (1)	118	119	11	9	11	10	128	11.3
Thin Papers	362	354	32	29	33	31	381	7.9
Bleached Bristols	1034	1094	97	84	102	101	1136	4.1
Tissue Paper	4262	3957	363	356	385	343	4313	7.2
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3980	3887	327	313	342	327	3873	-3.8
Other Paper (1)	1529	1385	154	137	158	138	1750	24.7
TOTAL PAPER GRADES	27491	27729	2422	2319	2579	2378	28998	3.7
PAPERBOARD								
Solid Wood Pulp Furnish	21689	21536	1945	1874	2006	1803	22732	5.5
Unbleached Kraft Linerboard	12880	13127	1172	1132	1205	1069	13670	4.0
Other Unbl. Kraft Paperboard	820	880	96	90	89	76	1045	18.9
Bleached Kraft Paperboard	3851	3604	326	317	357	321	3877	7.0
Semi-Chemical Paperboard	4139	3924	352	336	354	337	4140	6.4
Recycled Paperboard	7036	7187	598	513	616	576	7117	-1.3
TOTAL PAPERBOARD GRADES	28725	28723	2542	2387	2622	2379	29849	3.8
WET MACHINE BOARD	128	142	15	10	17	16	171	20.0
CONSTR. PAPER & INSUL. BOARD	3286	3374	291	254	304	265	3370	0.2
TOTAL ALL GRADES [Excl. H.P.B.]*	59630	59967	5270	4971	5522	5037	62388	3.6

WHOLESALE PRICE INDEXES

1967 = 100

	1977	1978	AUG.	SEPT	OCT.	NOV.		
Pulp, Paper and Products	186.4	195.6	221.9	222.8	227.2	229.3	217.8	11.9
Pulp, Paper & Products, except Waste Paper ♦	186.4	195.6	222.2	223.1	227.5	229.5	217.9	11.9
Total Wood Pulp	281.1	266.5	322.5	322.5	339.4	339.9	312.9	18.0
Total Paper	194.3	206.1	229.6	230.6	239.0	242.1	228.5	11.3
Total Paper, exc. Newsprint	187.2R	199.4	223.7	225.0	231.3	234.5	221.9	11.8
Newsprint	215.5	226.3	247.7	247.7	262.1	265.1	248.2	9.9
Total Paperboard	176.2R	179.6	205.0	209.5	211.2	212.8	200.8	12.2
Total Paper and Paperboard ♦	188.6R	197.8	221.9	224.0	230.3	232.9	219.7	11.5
Converted Products	176.6R	186.5	213.7	213.9	216.5	218.4	208.5	12.4
Waste Paper	187.2	191.2	206.6	206.7	206.7	220.0	205.3	7.4
All Commodities	194.2	209.3	238.1	241.7	245.2	246.9	234.1	12.2
Industrial Commodities	195.1	209.4	240.3	243.8	248.5	250.2	234.7	12.5

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. ♦ Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

production. On the basis of these preliminary estimates new supply of paper and paperboard in 1979 was equivalent to 49.1 thousand tons per billion dollars of real GNP, compared to 48.2 thousand tons in 1978 and 48.7 in 1976. These ratios suggest only modest increases in inventories of paper, paperboard and products in the channels of distribution. They further suggest that paper and paperboard new supply has achieved a new pattern of stability relative to real GNP.

Capital Expenditures

The latest data from the Department of Commerce show that capital expenditures by paper companies in 1979 will amount to $4,840 million, up 40% from the 1978 total. McGraw-Hill projects a further 19% increase in these expenditures in 1980. Data recently issued by The Conference Board offers strong confirmation to these trends. The Conference Board reported that new capital appropriations in the first three quarters of 1979 by those paper and allied product companies that are among the thousand largest corporations in the United States were 87% above their corresponding 1978 total. The Board also reported that capital expenditures by these companies were 47% over their year-ago level in the first three quarters of this year, and that the backlog of unspent appropriations was at an all-time high, some 49% over its year-ago level, at the end of the third quarter.

Appropriations peaked in the first half of the year. Appropriations in the third quarter of the year were 34% below the record high average of the first two quarters of 1979. The third quarter 1979 level was high by historic standards nonetheless. In fact, the appropriations in the first three quarters of the year were higher than the annual total of any prior year.

Capacity

The API has changed the release data of its annual Capacity Survey from October to December in order to include any new capacity announcements that develop from Fall planning meetings of the individual paper companies. The new survey shows that total paper and paperboard capacity in 1979 amounted to 68.9 million tons, 2.2% above the 1978 total. The 1978 total itself was 1.4% over that of 1977. The survey further reported that capacity would rise to 71 million tons in 1980, up 3.1%. A further rise of 3% is expected for 1981, and 2.6% for 1982.

Continued on Page 12

Continued from Page 11

The largest rate of increase among the paper grades is expected in newsprint, where capacity is projected to rise by 11% in 1980, 12.6% in 1981 and 6% in 1982. This will bring newsprint capacity in 1982 to 5.4 million tons, 1.3 million tons above the 1979 level. Newsprint consumption in the United States in 1979 is estimated at 11.2 million tons, so that the capacity increases are equivalent to 12% of the total supply or an average growth of 3.7% per year, which is a little above the 1976-1979 growth trend.

The expected increase in coated groundwood paper capacity is also relatively steep, reflecting the strong increase in demand for periodicals and magazines. A sizable part of this demand is currently supplied by imported paper. Capacity in this grade is expected to increase 8.5% in 1980 and nearly 12% in 1981, to bring the 1981 total above 3 million tons. A strong increase is also projected for uncoated free sheet papers, with a gain of 5.4% in 1980, to bring the total above the 8-½ million ton level. However, the increase in this grade in 1981 is projected at only 2.5%.

No major capacity expansion is expected in the packaging and industrial converting paper grades. Tissue paper capacity is projected in a strong uptrend, with the increase from 1978 to 1982 averaging 3.8% per year.

The rate of increase in paperboard capacity is expected to be somewhat below that of the paper grades. The largest rate of increase is expected in unbleached kraft linerboard, which will probably rise an average of 3.5% per year from 1979 to 1982. The increases in the other grades will be much smaller, ranging from 1.3% per year in the solid bleached grades, 1.6% per year in recycled paperboard, and 2.8% per year in semichemical paperboard.

The average rate of increase in wood pulp capacity, as reported in the survey, will be a shade below that of total paper and paperboard. Wood pulp capacity is expected to rise by an average 2.8% per year from 1979 to 1982, reaching 58.2 million tons in 1982. The rate of increase of total paper and paperboard in that same period is projected at 2.9% per year.

Copies of the new Capacity Survey are available to members of API upon request. The cost to non-members is $55.00, mailed to a domestic address; $60.00 overseas.

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

December 13, 1979

	PRODUCTION (000 TONS)					
	Nov. 1979	Oct. 1979	Nov. 1978	Jan - Nov. 1979	- 1978	% Change 79/78
PAPER GRADES	P	R				
Newsprint	365	371	321	3753	3458	8.5
Uncoated Groundwood (s)	124	133	117	1353	1198	13.0
Coated Paper (s)	376	406	380	4139	4115	0.6
Uncoated Free Sheet Paper (s)	635	708	603	7201	6647	8.3
Thin Paper (c)	34	33	31	353	326	8.4
Cotton Fiber Paper (s)	11	11	10	116	105	9.9
Bleached Bristols (c)	106	105	95	1063	1007	5.5
Tissue Paper	375	395	344	4189	3887	7.8
Unbleached Kraft Packaging & Indl. Converting (s)	325	348	306	3650	3588	1.8
Other Paper (c)	140	155	118	1608	1319	21.8
TOTAL PAPER	2491	2665	2324	27424	25649	6.9
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1190	1251	1153	12898	12267	5.1
Other Kraft Paperboard	109	101	77	1147	1074	6.8
Semichemical Paperboard	398	403	386	4346	4102	6.0
Bleached Paperboard	342	343	318	3702	3695	0.2
Recycled Paperboard	631	675	644	7048	6924	1.8
TOTAL PAPERBOARD	2669	2773	2578	29141	28061	3.8
CONSTRUCTION & WET MACH GRADES(c)	280	301	304	3237	3240	-0.1
TOTAL PAPER AND PAPERBOARD	5440	5738	5206	59802	56950	5.0
HARD PRESSED BD.[not in total](c)	175	200	170	1994	2024	-1.5

WOOD PULP (ALL GRADES)	Oct. 1979	Sept 1979	Oct. 1978	Jan - Oct. 1979	- 1978	% Change 79/78
Dissolving & Special Alpha	148	109	103	1250	1206	3.7
Bleached Sulphite	124	127	90	1136	1238	-8.2
Unbleached Sulphite	35	32	32	333	267	24.8
Bleached & Semi-Bl. Sulph.	1607	1452	1552	15101	14407	4.8
Unbleached Sulphate	1722	1603	1659	16445	15926	3.3
Semichemical	442	397	360	3986	3364	18.5
Groundwood and Thermo-Mechanical	389	370	380	3734	3638	2.6
TOTAL PULP DIVISION DATA	4466	4088	4176	41985	40046	4.8
Defib. Exploded & Scrngs E	307	267	277	2680	2651	1.1
TOTAL WOOD PULP PRODUCTION	4773	4355	4453	44665	42697	4.6

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments R - Revised E - Estimate
P - Preliminary (c) - Census Data - Production, last 2 months estimated.

December 19, 1979

	Full Year		INDUSTRY DATA			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1977	1978	September	October	November		
Total Production (API).......¦ ¦...	59778	61632	5259	5738	5440	6[illegible]238	5.0
Total Seasonally Adjusted....¦ excluding ¦...			5456	5407	5430	64699	5.0
Imports (including Products).¦hard pressed¦..E	7432	9117	672	767	720	9046	-1.8
Exports (including Products).¦ board ¦..E	3230	3373	339	340	315	3646	7.9
Apparent Consumption.........¦ ¦...	63980 a	67376 b	5789	5834	5835	70097 c	3.9
Paper Production % Tonnage Capacity...........	91.9 s	91.7 s	92.6	98.0	94.2	95.9 hs	–
Paperboard Production % Tonnage Capacity......	90.9 s	92.7 s	90.0	95.5	93.9	94.0 s	–
			August	September	October		
MARKET WOOD PULP PRODUCTION - Tons (000).........	4819	5165	516	482	532	5675	8.1
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	46652	47662	4393	4088	4466	50382	4.8
WOOD PULP IMPORTS - TONS (000)..................	3864	4025	378	323	358	4325	9.3
WOOD PULP EXPORTS - TONS (000)..................	2640	2599	247	275	265	2867	9.3
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			August	September	October		
Wood Pulp..(k)............................	47596	48777	4465	4169	4301	51140	4.3
Waste Paper....(d)........................	14058	14600	1295	1219	1355	15063	2.8
Other (Census)............................E	745	666	56	52	55	655	-2.5
Total.................	62399	64043	5816	5440	5711	66859	3.9
..WOOD PULP - NON PAPER..........................E	876	884	76	70	75	908	4.3
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	74807	77290	6644	6448	7103	80143	2.8
EMPLOYMENT (000)			September	October	November		
Paper and Allied Products..........Total......	691.6	700.9	718.5	717.6	717.5	714.3	1.9
Pulp, Paper and Board Mills........Total.....E	272.3	267.0	273.4	271.9	271.8	271.0	1.4
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products......................	5.96	6.52	7.32	7.33	7.40	7.08	9.0
Pulp, Paper Mills............................E	6.75	7.44	8.57	8.64	8.70	8.22	10.8
Paperboard Mills.............................E	6.94	7.68	8.71	8.68	8.70	8.33	9.1
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q2	1979 Q3	1979 Q4		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)#	3.36	3.46	4.80	4.68	5.09	4.84	40.0
INDEX OF OUTPUT PER MAN-HOUR (1967=100)..........			July	August	September		
¦IN PULP, PAPER ¦...Production Workers.......RS	148.1	153.9	154.5	157.6	159.2	157.8	3.7
¦AND BOARD MILLS¦...All Employees............RS	144.0	148.4	149.2	151.9	153.4	152.1	3.3
PAPER AND ALLIED PRODUCTS (Million $)			August	September	October		
Industry Shipments (Dept. of Commerce)#.......	52368	57654	5634	5544	5688	66001	15.4
Pulp, Paper and Paperboard#.................	23701	25343	2586	2565	2635	29957	19.3
Inventories (End of Period) - Total Industry#.	5628	5875	6363	6422	6539	6539	12.7
Pulp, Paper and Paperboard#.................	2102	2006	2148	2137	2205	2205	10.5
			1979 Q1	1979 Q2	1979 Q3		
Sales (Corporations Only, FTC)................	45750	48982RS	12997	13828	14133	54611	13.3
Earnings (Corporations Only, FTC).............	2367	2598RS	867	917	1162	3928	58.0
Depreciation (Corporations Only, FTC).........	1663	1726RS	447	479	481	1876	9.8
Net Worth (Corporations Only, FTC)............	19704	20794RS	21282	21808	22688	22688	12.3
PRICE INDEXES (Bureau of Labor Stats)1967=100			September	October	November		
Total Pulp, Paper and Allied Products.........	186.4	195.6	222.8	227.2	229.3	217.8	11.9
Wood Pulp.....................................	281.1	266.5	322.5	339.4	339.9	312.9	18.0
Waste Paper...................................	187.2	191.2	206.7	206.7	220.0	205.3	7.4
Paper...	194.3	206.1	230.6	239.0	242.1	228.5	11.3
Paperboard....................................	176.2	179.6	209.5	211.2	212.8	200.8	12.2
PAPER DEMAND (INDEXED: 1967=100)			September	October	November		
Total Paper Production #......................	131.0	133.1	143.6	145.4	142.9	142.3	6.9
Paper New Supply #..........................	124.0	131.2	134.8	139.7	136.3	137.6	4.6
Total End - Use Index #.....................	134.4	139.5	144.7	145.6	146.2	144.7	4.0
Production of Nondurable Goods #...(19%)..	150.5	157.0	164.4	164.7	165.0	163.2	4.3
Disposable Income (Constant $) #...(23%)..	138.6	145.2	147.7	147.6	147.8	148.4	2.5
Total Printing and Publishing #...(58%)..	127.6	131.5	137.1	138.5	139.4	137.2	4.5
Trend Factor	----------------------------Not Available----------------------------						
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production #................	127.0	132.8	140.4	136.0	139.4	137.6	3.8
Production for Domestic Use	271.3	227.3	139.5	133.8	137.0	135.8	3.8
Total End - Use Index #.....................	141.6	147.7	151.6	151.6	150.6	151.7	3.0
Production of Consumer Goods #...(60.49%)	145.3	149.1	149.8	149.9	148.7	150.5	1.1
Production of Equipment #...(6.62%)	123.0	132.8	143.5	142.7	142.8	141.7	7.2
Production of Materials #...(32.89%)	138.6	148.3	156.4	156.6	155.6	155.9	5.7
Trend Factor	----------------------------Not Available----------------------------						
NEWSPRINT MARKETS			August	September	October		
Consumption by Publishers - Tons (000)........	10228	10872	912	952	1023	11125	4.5
Newspaper Pub. and Printing Emp. Total (000)..	395.6	407.4	421.6	421.8	424.7	419.0	3.2
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	106489	115239	7596	10803	12172	115958	3.9
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	15482	17586	1777	1599	1785	19616	12.5
Inventories (End of Period)	1261	1482	1604	1663	1640	1640	15.6
Paper Only..............................Sales	11799	13079	1327	1202	1340	14851	15.0
Inventories (End of Period)	873	1025	1055	1109	1111	1111	14.7
RETAIL TRADE (Million $)			September	October	November		
Total Retail Sales #...........................	724020	798818	76929	75620	76992	879065	10.7
Nondurable Goods Stores Sales #..............	476188	520902	49957	50209	51097	575700	11.1
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)#.	138.2	146.1	152.4	152.4	151.6	151.2	3.8
WHOLESALE PRICES(ALL COMMODITIES)(INDX 1967=100)	194.2	209.3	241.7	245.2	246.9	234.1	12.2
			August	September	October		
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	181.5	195.4	221.1	223.4	225.4	215.2	10.9
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	230.8	275.6	299.8	303.9	305.2	305.2	14.8
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1979 Q1	1979 Q2	1979 Q3		
G.N.P. or Expenditure - Current $.............	1899.5	2127.6	2292.1	2329.8	2396.5	2339.5	11.8
G.N.P. OR Expenditure - 1972 $................	1340.5	1399.2	1430.6	1422.3	1433.3	1428.7	2.8

lb/capita	Popul.(mil)
.a - 590	216.8
.b - 617	218.5
.c - 636	220.4

.d - 1977 - 12192; 1978 - 13185
. 1979 A.R. Jan-Sept - 12965
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1977 - 3,218; 1978 - 3,138; 1979 A.R.Y-T-D 3,216 (000 tons)
s - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '77 - 1,688; '78 - 1,655 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
- Seasonally adjusted

A2500-2

MONTHLY STATISTICAL SUMMARY

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AMERICAN PAPER INSTITUTE
260 Madison Avenue New York, N. Y. 10016

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Vol. 58 JANUARY 1980 No. 1

Paper Industry in 1979

Preliminary data show total production of paper and paperboard in 1979 at 64.7 million tons, 5% above the 61.6 million tons produced in 1978, establishing a new production high for the industry. Imports, including products, based on eleven months data, are estimated at 9.1 million tons, exports at 3.6 million tons, indicating a new supply total of 70.2 million tons, 4.2% ahead of 1978's 67.4 million tons. This compares to a 2.3% increase in the real gross national product and a 3.5% increase in total industrial production.

Paper and paperboard production started off slowly in the early months of 1979, under the impact of continuing strikes at some West Coast mills that started in mid-1978. However, by March, labor disruptions were minimal and the seasonally adjusted rate of production reached the 65 million tons level, which it held through the end of the year. In fact, the preliminary data for December 1979 show the seasonally adjusted rate a little above the March level. Preliminary data for the early weeks of 1980 indicate paper and paperboard production holding at these relatively high levels.

Technical Note: The API has discontinued collecting and publishing detailed weekly data on paperboard production. There will, however, be some summary paperboard data published on a weekly basis.

Continued on Page 2

Continued from Page 1

The pattern of relative strength and weaknesses among the various grades was established early in 1979 and continued throughout the year. Virtually all of the paper sectors with the exception of packaging grades, showed major gains. Newsprint, for example, rose by 9%, reflecting the start up of three new machines. The 4.1 million ton total reached in 1979 marked a new high in domestic production. Printing and writing papers, at 15.4 million tons, was 6% above the 1978 total, reflecting the resurgence in print advertising of all types, including magazines, newspaper inserts, commercial printing, mail order catalogues, direct mail, along with the continued strength in the demand for office copy papers, computer printouts and other types of form bond papers. Gains were reflected in all grades: uncoated groundwood, up 12.5%, uncoated free sheet papers, up 8.4%, and the cotton fiber papers up 10%. Coated paper shipments showed little change from the year-ago level, mainly because of capacity limitations.

While coated paper production showed no significant gain over its year-ago level and coated paper imports, at an estimated 193,000 tons, were down about 10% from the 214,000 tons imported in 1978, it appears that a part of the 825,000 tons of uncoated paper imported in 1979, was used in markets normally served by coated paper, such as magazines and fast-growing newspaper insert markets. Altogether, a record high 1.2 million tons of printing/writing papers were imported in 1979 to augment the domestic supply. At present, three major uncoated free sheet machines are coming into operation along with two coated groundwood paper machines. These will act to improve the total supply of printing papers in 1980.

Although kraft paper shipments showed only a 2.3% gain over the 1978 level, demand for kraft paper was relatively strong and that sector of the industry fully utilized its capacity.

Tissue paper production at 4.5 million tons, was nearly 8% over the year-ago total, and established a new high for this product.

Total paperboard production in 1979 reached a new high of 31.4 million tons, 3.9% over the year-ago total. The gains, as has been the case all year, were centered on the containerboard grades, with kraft linerboard production up 5.4%, and semichemical paperboard production up 5.7%.

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

	YEAR		SEPT	OCT.	NOV.	DEC.	Annual Rate Y-T-D	% Change from same Period Last Year
	1977	1978	1979	1979	1979	1979	1979	
PAPER					R	P		
Newsprint - Production	3870	3768	340	371	367	355	4109	9.1
- Shipments	3866	3779	339	371	364	355	4105	8.6
Printing & Writing	13865	14545	1249	1384	1312	1181	15411	5.9
Groundwood Paper - Shipments	1331	1309	119	133	129	115	1472	12.5
- New Orders	1336	1367	124	139	104	111	1475	7.9
- Unfilled Orders	137	179	204	207	191	182	182	1.6
Coated Paper - Shipments	4261	4448	364	406	381	337	4481	0.7
- New Orders	4279	4428	348	378	394	351	4500	1.6
- Unfilled Orders	398	404	432	408	432	411	411	1.6
Unctd Free Sheet - Shipments	6777	7225	632	708	665	600	7832	8.4
- New Orders	6833	7542	628	678	635	565	7764	2.9
- Unfilled Orders	436	754	756	730	744	656	656	-13.0
Thin Paper - Production *	362	354	31	31	31	29	377	6.4
Cotton Fiber Paper - Shipments	108	114	10	11	11	10	126	9.8
Bleached Bristols -Production*	1026	1095	92	95	96	90	1124	2.7
Tissue Paper - Production	4286	4215	367	397	374	350	4540	7.7
Total Packaging & Other Paper	5390	5314	460	499	476	445	5714	7.5
Unbl. Kraft Paper - Shipments	3815	3884	319	348	336	310	3971	2.3
Other Paper - Production * #	1575	1430	141	152	140	135	1742	21.8
TOTAL PAPER-Production-Unadj.	27411	27842	2416	2651	2529	2331	29774	6.9
-Production-S.A.			2501	2525	2532	2451	29796	6.9
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	21636	22790	1935	2098	2039	1731	23821	4.5
Unbl. Kraft Linerboard - Total	12573	13228	1142	1251	1190	1039	13937	5.4
Production for Export	1290	1466	126	141	148	120	1584	8.0
Other Unbl. Kraft Paperboard	1078	1145	89	101	109	59	1204	5.2
Semichemical Paperboard	4264	4439	387	403	398	347	4694	5.7
Production for Export	122	119	6	7	6	4	91	-24.0
Solid Bleached Paperboard	3721	3979	318	343	342	285	3985	0.2
Production for Export	389	430	33	37	38	30	431	0.3
Recycled Paperboard	7317	7485	622	675	631	567	7624	1.9
Production for Export	30	22	1	2	1	2	18	-14.3
TOTAL PAPERBOARD-Prod.-Unadj.	28953	30275	2558	2773	2669	2298	31445	3.9
- Production - S.A.			2670	2586	2651	2716	31498	3.8
- New Orders	29022	31194	2555	2854	2605	2234	32022	2.7
- Unfilled Orders	1037	1370	1622	1594	1484	1353	1353	-1.3
WET MACHINE BOARD *	128	142	13	15	13	12	138 R	-2.6
BUILDING PAPERS *	1850	1956	148	171	160	140	1911	-2.3
INSULATING BOARD *	1435	1417	116	128	115	100	1430	0.9
TOTAL ALL GRADES - Unadjusted	59778	61632	5250	5738	5486	4881	64698	5.0
- Production - S.A.			5446	5406	5476	5455	64778	5.0
HARD PRESSED BD. [not in total]*	2237	2180	187	201	175	155	2150	-1.4

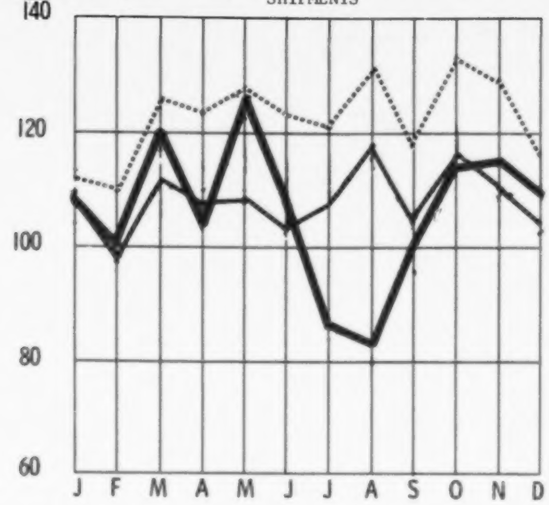
* Census Data - Production. Last two months estimated.
# Production excludes API bleached kraft envelope.
## Includes revisions not available monthly.

S.A. Seasonally Adjusted
P Preliminary
R Revised

THOUSANDS OF TONS

GROUNDWOOD PAPER, UNCOATED

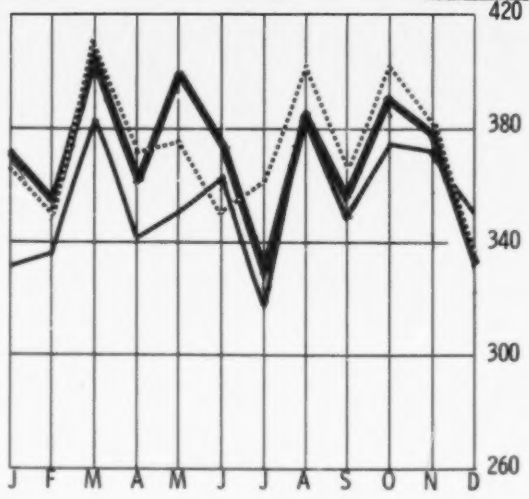
SHIPMENTS



COATED PAPER

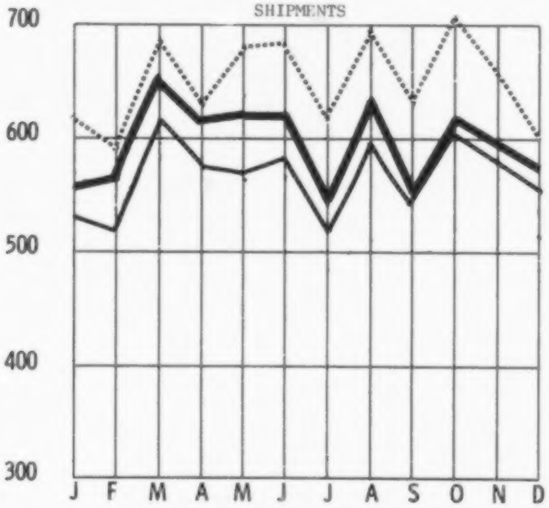
SHIPMENTS

THOUSANDS OF TONS



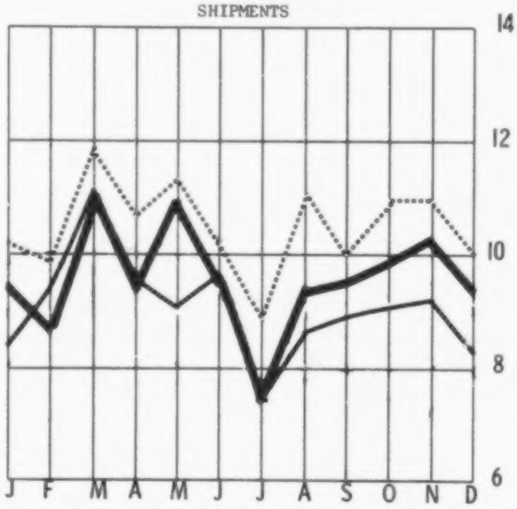
UNCOATED FREE SHEET PAPERS

SHIPMENTS



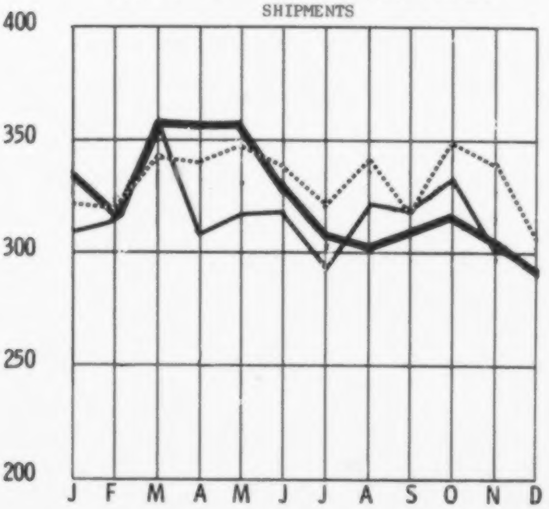
COTTON FIBER PAPER

SHIPMENTS



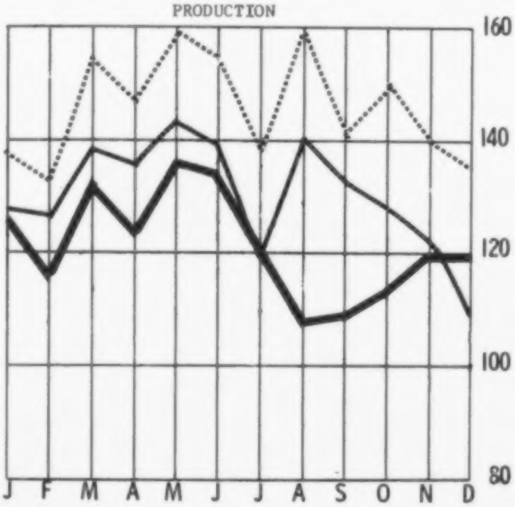
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1977 ——— 1978 ━━━ 1979 ·········

WOOD PULP STATISTICS
(Thousands of Tons)

	YEAR 1977	YEAR 1978	AUG. 1979	SEPT 1979	OCT. 1979	NOV. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
TOTAL WOOD PULP (1)					R	P		
Total Wood Pulp - Production	46652	47662	4393	4088	4470	4304	50501	5.2
- Imports	3864	4025	378	323	358	373	4339	8.6
- Exports	2640	2599	247	275	265	255	2885	10.7
- New Supply	47877	49088	4524	4136	4563	4422	51955	5.2
Dissolving Pulp - Production	1467	1411	155	109	148	130	1505	5.0
- Imports	181	189	19	24	9	20	187	-4.7
- Exports	796	758	71	63	64	67	752	-3.1
- New Supply	852	842	103	69	93	83	940	10.1
Paper Grades - Production	36897	37847	3409	3213	3491	3362	39687	4.0
Chemical Pulp - Imports	3481	3627	331	285	333	340	3948	9.7
- Exports	1763	1780	171	203	193	180	2063	16.7
- New Supply	38615	39694	3569	3295	3631	3521	41572	4.0
Groundwood and - Production	4403	4373	387	370	389	378	4486	2.6
Thermo-Mech. - Imports	203	208	27	14	16	13	204	2.1
- Exports	81	62	4	8	8	8	70	9.7
- New Supply	4525	4519	410	375	396	383	4620	2.4
Semi-Chemical - Production	3886	4031	441	397	442	435	4824	19.1
- Imports	0	0						
- Exports	0	0	------ Included with Groundwood Pulp ------					
- New Supply	3886	4031	441	397	442	435	4824	19.1
MARKET WOOD PULP								
Total Market - Production	4819	5165	516	482	532	509	5715	9.4
Wood Pulp - Imports	2684	2816	240	227	251	265	3069	9.0
- Exports	2359	2480	238	287	231	249	2751	10.6
- New Supply	5144	5501	518	421	552	526	6033	8.6
Dissolving Pulp - Production	1465	1406	155	108	147	130	1505	5.4
- Imports	256	291	29	28	13	25	316	6.5
- Exports	798	824	93	87	63	77	855	3.8
- New Supply	923	873	91	49	97	78	966	7.2
Paper Grades - Production	3263	3675	354	367	378	373	4148	11.7
Chemical Pulp - Imports	2394	2495	210	198	237	240	2746	10.4
- Exports	1515	1613	141	198	164	168	1851	14.2
- New Supply	4143	4557	423	368	452	445	5043	10.1
Groundwood Pulp - Production	90	83	6	7	6	7	62	-25.2
and All Other - Imports	35	26	1	0	2	0	7	-75.3
- Exports	46	42	4	2	4	4	45	8.1
- New Supply	80	67	3	5	3	3	23	-66.0

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1977 - 3218; 1978 - 3155;A.R.Y-T-D'79 - 3181

SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

FIBROUS RAW MATERIALS
(Thousands of tons)

CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	62399	64203	5844	5469	5953	5819	67666	5.0
Total Wood Pulp (2) A	47596	48777	4465	4171	4513	4368	51490	5.0
Market Wood Pulp A	4216	4774	418	395	438	435	5075	6.3
Waste Paper (3) A	14058	14760 R	1323	1246	1385	1397	15520 R	5.1
Rags, Straw & Other C, E	745	666	56	52	56	54	656	-2.1
INVENTORIES								
Wood Pulp at Pulp Mills A	193	130	122	114	112	117	117	-21.5
Market Pulp at Pulp Mills A	277	187	166	146	152	158	158	-27.5
Mkt Pulp at Ppr.& Bd. Mills CE	404	435	438	386	388	370	370	-12.6
Waste Ppr.at Ppr.&Bd. Mills CE	728	740	636	633	642	620	620	-12.6
Rags, Straw and Other at Paper and Board Mills C, E	67	66	61	62	62	60	60	-9.1
Mkt Wood Pulp Days of Supply A	55	44	42	37	36	34	34	-24.7
Wood Pulp Consumption at at Non-Paper Mills C, E	876	884	76	70	81	75	913	4.0

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API

P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons

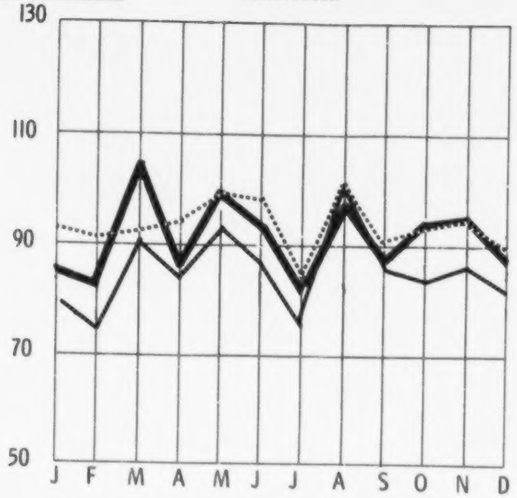
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.: 1977 - 1,688,000; 1978 - 1,655,000 ton

(3) Census Waste Paper Consumpt.(000 tons): 1977 - 12192; 1978 - 13185; 1979(Annual Rate Jan-Oct) 13042

THOUSANDS OF TONS

BLEACHED BRISTOLS

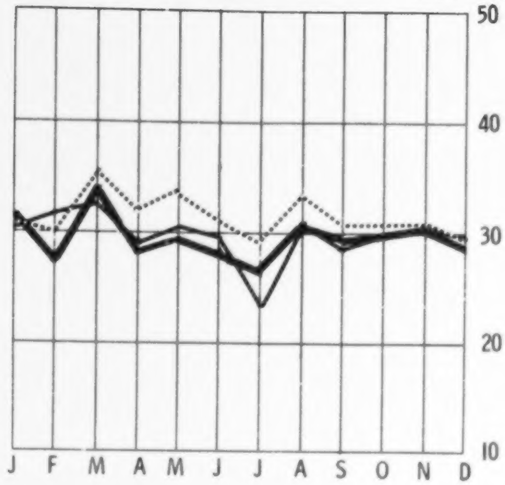
PRODUCTION



THIN PAPERS

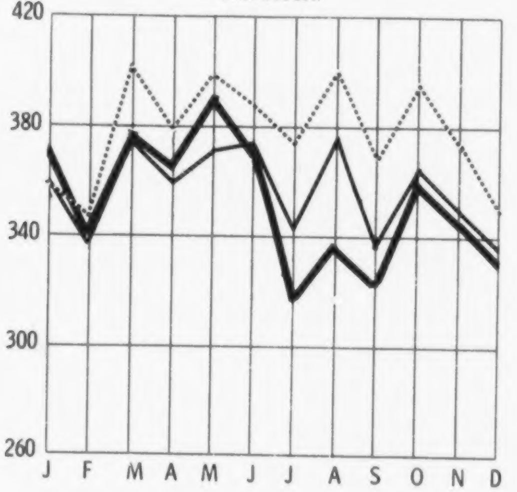
PRODUCTION

THOUSANDS OF TONS



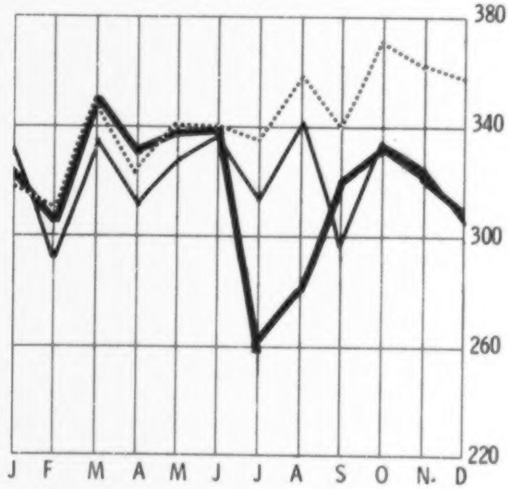
TISSUE PAPER

PRODUCTION



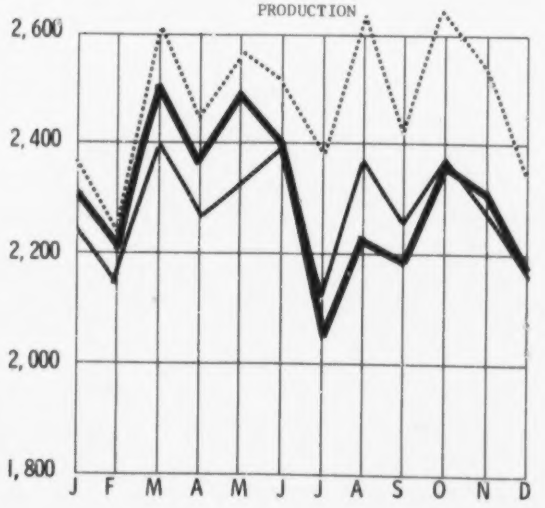
NEWSPRINT

PRODUCTION



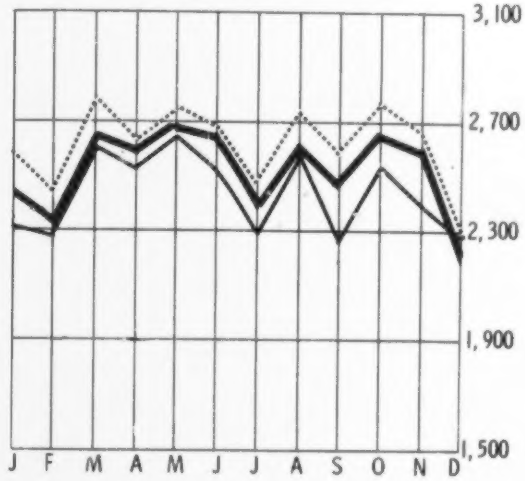
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1977 —— 1978 ▬▬ 1979 ••••••••

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1977	YEAR 1978	AUG. 1979	SEPT 1979	OCT. 1979	NOV. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	74034	77025	6955	6465	7505	6557	78705	2.0
	- Total Consumpt.	74807	77290	6644	6448	7103	6723	80192	3.1
	- Residues *	30112	30369	2707	2444	2915	2317	30398	-0.4
	- Inventories	6187	6244	4847	4943	5320	5110	5110	-14.5
So. Atlantic	- Total Receipts	23727	25353	2224	2080	2393	2202	26207	3.3
	- Total Consumpt	23820	25204	2158	2194	2385	2240	26824	5.7
	- Residues *	7880	8513	766	698	807	718	8929	4.9
	- Inventories	1003	1191	972	894	911	880	880	-16.1
Northeast	- Total Receipts	5954	6664	656	611	649	662	7465	12.8
	- Total Consumpt	6250	6607	625	554	661	681	7624	15.9
	- Residues *	1426	1662	158	129	143	147	1699	2.8
	- Inventories	584	770	625	684	680	654	654	-14.3
South Central	- Total Receipts	24367	25572	2332	2157	2568	2178	26650	4.6
	- Total Consumpt	24394	25678	2232	2096	2308	2154	26654	3.4
	- Residues *	8415	8418	721	673	787	655	8785	4.2
	- Inventories	1279	1194	874	979	1243	1281	1281	21.1
North Central	- Total Receipts	4996	5291	539	480	518	452	5521	5.3
	- Total Consumpt	5261	5330	453	438	448	474	5569	4.3
	- Residues *	1430	1456	131	126	142	138	1510	6.6
	- Inventories	1029	968	786	832	885	857	857	-6.9
West	- Total Receipts	14990	14145	1204	1137	1377	1063	12862	-10.9
	- Total Consumpt	15082	14471	1176	1166	1301	1174	13520	-8.2
	- Residues *	10961	10320	931	818	1036	659	9476	-9.7
	- Inventories	2292	2121	1590	1554	1601	1438	1438	-34.2

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1978		OCT. 1979		NOV. 1979		Annual Rate Y-T-D 1979	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000		
Pulpwood, Roundwood (in cords of 128 cubic feet)	267517	11155	26097	1139	16647	704	207307	-17.9
Pulpwood Chips	1817114	34737	173509	3555	137231	2838	1551605	-16.6
Wood Pulp, Total	3847590	1041860	358021	128032	348591	128864	4149724	9.1
Waste Fibrous Materials, Total	99872	13581	3326	549	8374	1296	93013	-8.9
Paper,Paperboard&Products,Total	8666058	2496771	717606	241702	735815	258585	8485680	-3.1
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8625089	2454161	713399	236555	731663	253800	8441305	-3.1
Paper, Total	8209265	2382065	669161	228189	699763	246728	7997787	-3.6
Newsprint	7477824	2108925	576311	187537	618252	210180	7041135	-7.1
Printing,Writing & Rel.Pap.	592897	215790	81148	34298	71737	31397	818178	40.4
Pack. & Ind. Conv. Paper	126672	50896	9710	4987	8615	4269	117893	-4.3
Special Industrial Paper	556	595	305	388	352	444	3238	700.4
Tissue Paper	11315	5860	1688	979	808	438	17342	56.2
Paperboard, Total	97162	16488	7381	1616	7679	1896	77380	-20.3
Wet Machine Board	1437	758	197	88	35	19	1459	1.9
Construction Paper and Bd. *	317225	54849	36660	6662	24187	5158	364679	13.5
Convtd Paper&Paperbd Products	40970	42611	4206	5147	4151	4786	44375	11.2

EXPORTS TO CANADA

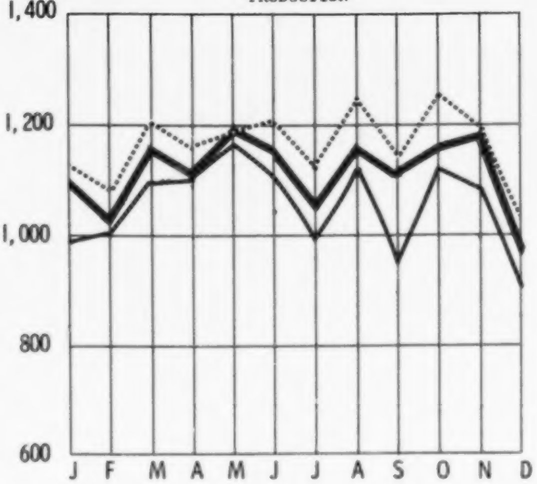
Pulpwood, Roundwood (in cords of 128 cubic feet)	216233	8823	14933	629	16611	814	273999	30.0
Pulpwood Chips	89406	4695	8707	210	3404	82	94657	7.9
Wood Pulp, Total	98813	32570	9514	3846	14825	5707	139426	40.0
Cotton Pulp & Other Pulp	12291	4437	298	142	688	419	8002	-38.0
Waste Paper	341671	33467	60077	5994	37143	4098	473633	42.3
Paper,Paperboard&Products,Total	667324	356156	53546	32440	55165	31583	633151	-6.1
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	469501	232442	37590	21665	39235	21302	457662	-3.6
Paper, Total	196765	143884	15909	13254	16586	12558	181789	-9.2
Newsprint	2368	1794	94	96	177	135	2938	26.5
Printing,Writing & Rel.Pap.	115565	80005	10774	7815	8185	6089	108774	-7.5
Pack. & Ind. Conv. Paper	28732	13338	1563	993	1084	1057	16390	-44.6
Special Industrial Paper	40579	41156	3097	4121	6725	4887	45794	11.8
Tissue	9522	7592	381	228	415	390	7893	-18.1
Paperboard, Total	220964	70738	18991	7032	19834	7430	233289	5.1
Wet Machine Board	4906	2446	483	296	288	184	5358	13.5
Construction Pap. & Bd. E *	46866	15374	2208	1084	2526	1129	37226	-22.0
Convtd Paper&Paperbd Products	197823	123714	15955	10775	15930	10281	175489	-12.1
* - Hard Pressed Board (not in total)								
Imports of Hard Pressed Bd.	22803	3622	4545	787	3895	706	29727	28.9
Exports of Hard Pressed Bd.	18926	5216	1592	536	1075	371	21280	13.0

SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

THOUSANDS OF TONS

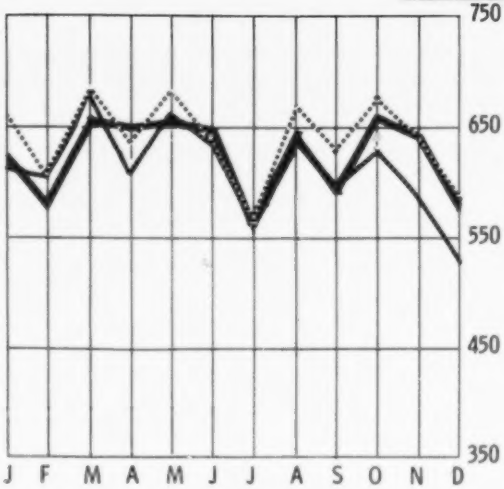
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



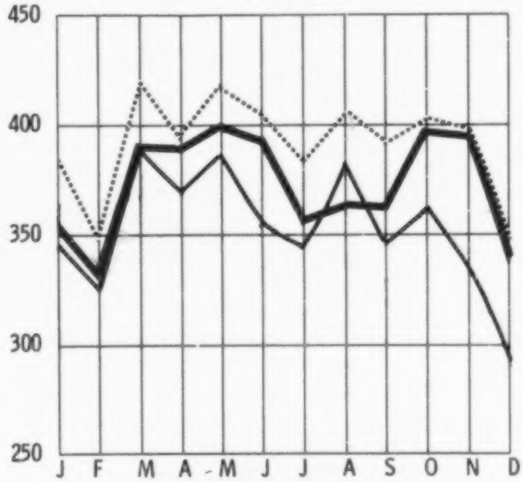
RECYCLED PAPERBOARD

THOUSANDS OF TONS



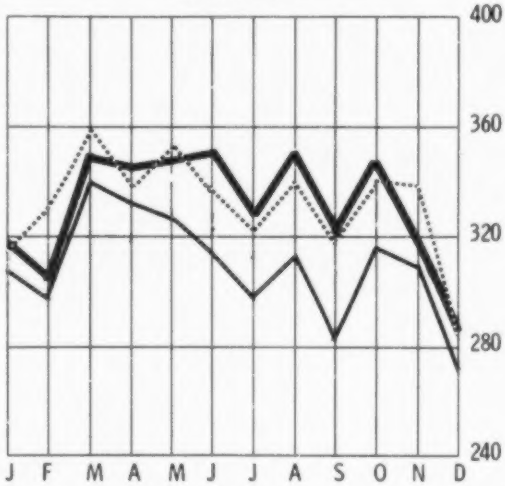
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



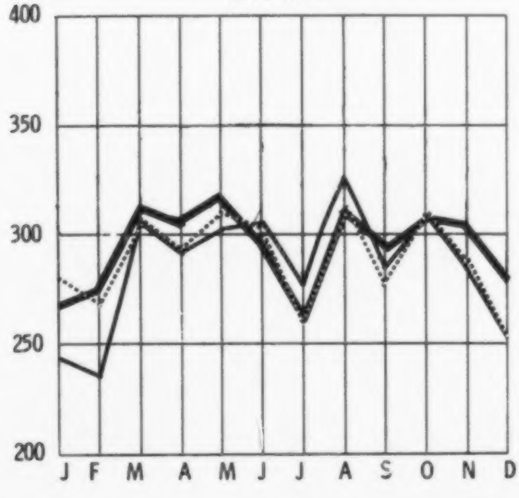
SOLID BLEACHED PAPERBOARD

PRODUCTION



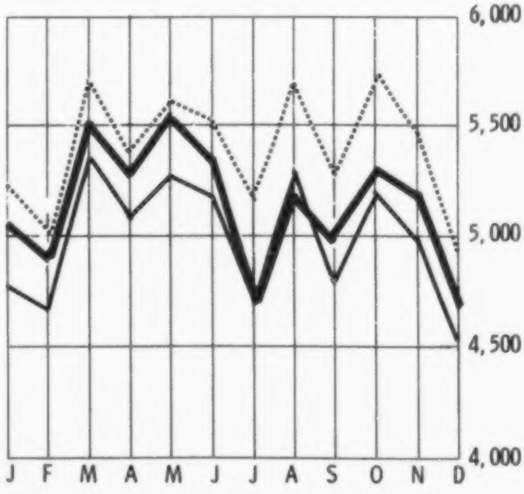
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1977 —— 1978 ▬▬ 1979 ....

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1978		OCT. 1979		NOV. 1979		(1) Annual Rate Y-T-D 1979	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000		
Pulpwood, Roundwood (in cords of 128 cubic feet)	270662	11481	26121	1140	16647	704	207333	-19.0
Pulpwood Chips	1819169	34864	173509	3555	137231	2838	1602910	-13.9
Total All Imports	13267526	3926572	1129870	410091	1169601	433503	13568432	1.8
Wood Pulp, Total	4024560	1086438	358021	130116	373119	136904	4338505	8.6
Waste Paper	69440	7253	1936	209	7426	1089	65809	-7.0
Other Fibrous Materials	56093	16854	2851	1048	2486	938	45560	-20.0
Paper,Paperbd&Products,Total	9117433	2816028	767063	278718	786569	294572	9118558	-1.0
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9024340	2640421	758596	257463	777778	273144	9021591	-1.0
Paper, Total	8591929	2562762	712273	248670	743630	265491	8553467	-1.5
Newsprint	7483720	2111648	590134	192077	635558	216843	7187494	-5.2
Printing & Writing	958157	385371	109397	49367	97517	42619	1204548	26.9
Uncoated Groundwood	521602	177010	76869	29906	72582	27419	826425	62.4
Uncoated Book	203204	78744	12566	6487	8868	4733	145909	-29.5
Coated Print.& Impreg. Pap	213658	109204	16662	9778	11387	6742	192483	-10.4
Bristols	618	427	174	83	76	51	2355	358.9
Writing and Similar Paper	11748	14284	2449	2470	3252	2634	22827	109.4
Thin (except Cigarette)	7327	5703	677	643	1351	1040	14549	92.4
Total Pkg & Other Paper	138132	59377	11051	6241	9747	5592	143785	6.7
Unbleached Kraft Paper	64623	19296	5196	2082	4164	1625	68176	8.7
Other Pkg. & Indust. Paper	73509	40081	5856	4159	5584	3967	75609	5.0
Tissue	11920	6366	1691	986	808	438	17641	51.2
Paperboard, Total	100102	18283	7426	1664	7750	1967	79016	-21.2
Test or Containerboard	31860	5185	2741	656	3069	770	22068	-32.3
Semi-Chemical Corrugating	48027	7412	3411	612	2278	415	34732	-27.5
Other Paperboard	20215	5685	1275	396	2403	782	22216	12.5
Wet Machine Board	2717	1497	224	103	118	99	2305	-17.3
Construction Paper & Bd. *	329593	57879	38674	7025	26281	5587	386803	15.9
Building Paper	271870	47017	33068	5847	21790	4604	333926	21.1
Insulating Board	25392	4997	2160	419	1824	375	22417	-11.0
Other Building Board	32331	5865	3446	759	2667	608	30460	-7.2
Convtd Paper&Paperbd Products	93093	175607	8467	21255	8791	21428	96967	4.3
Paper Products, Total	86791	164651	7890	19525	8348	20568	91126	5.4
Paperboard Products, Total	6302	10956	577	1730	443	860	5841	-9.7
Notes								
Other: No Weight Avail. ($000)		78967		6926		7094	82531	4.8
Total Imports Incl. Other($000)		4005539		417017		440597	4750622	18.7

EXPORTS

							(1)	
Pulpwood, Roundwood (in cords of 128 cu. ft.)	218270	8960	14933	629	16611	814	274385	29.0
Pulpwood Chips	3617574	156779	348136	16583	429312	20147	4474990	25.3
Total All Exports	7659628	2571426	841784	319462	781778	300570	8839741	15.3
Wood Pulp,Total	2598952	817102	264612	103085	255453	101273	2885287	10.7
Cotton Pulp and Other Pulp	88481	47987	14004	8044	10285	5837	129116	43.1
Waste and Old Paper	1599449	145884	222755	25315	205900	24696	2184591	37.4
Paper, Paperbd&Products, Total	3372746	1560452	340413	183018	310140	168763	3640747	7.7
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	2895732	1108079	289547	128855	260134	116275	3080548	6.0
Paper, Total	542675	415574	56408	47364	52457	44054	562815	2.1
Newsprint	82454	29947	10843	4418	10796	5090	67658	-21.6
Printing & Writing	266096	208801	24821	22512	19319	18634	272650	1.1
Uncoated Groundwood	58109	37154	5950	4578	5691	4943	80328	40.6
Clay Coated Paper	73592	54358	6800	5662	5693	4485	73414	-1.2
Uncoated Free Sheet	84896	66185	7326	6538	4496	4852	66541	-24.5
Other Printing & Writing	49500	51103	4744	5734	3440	4354	52367	4.4
Total Pkg. & Other Paper	172995	159013	18079	17958	20639	18551	194887	11.7
Unbleached Kraft	45442	17440	7390	3212	7495	3568	57391	25.9
Other Pkg. & Indust. Paper	127553	141573	10689	14746	13144	14983	137496	6.7
Tissue	21130	17814	2666	2475	1703	1779	27621	31.2
Paperboard, Total	2281653	662216	228429	79087	202954	69761	2455496	7.6
Solid Wood Pulp	2078118	576605	209438	71263	188083	63320	2277096	9.7
Total Linerboard	1539510	344110	153807	44506	126238	35130	1626733	5.6
Bleached Kraft Linerboard	194421	50671	17089	5141	5523	1916	174701	-9.4
Unbleached Kraft Linerbd	1345089	293439	136718	39365	120716	33215	1452032	7.8
Other Unbleached Kraft	65833	22330	7173	2449	11734	3913	99171	45.9
Other Bleached Kraft	440724	204423	45527	23426	46840	23288	533005	23.2
Semi-Chemical Corrugating	32051	5742	2932	883	3271	988	18187	-46.9
Recycled Paperboard	203535	85611	18990	7824	14872	6440	178401	-13.6
Wet Machine Board	7554	4805	562	406	491	414	7457	1.1
Construction Paper & Bd. *	63850	25485	4149	1998	4232	2047	54779	-15.1
Building Paper	37166	13220	2497	1146	2654	1219	33710	-8.2
Insulating Board E	26684	12265	1652	853	1579	828	21069	-24.3
Convtd Paper&Paperbd Products	477014	452373	50866	54163	50005	52488	560200	18.1
Paper Products, Total	274884	326728	30125	39531	30761	39166	333657	22.2
Paperboard Products, Total	202130	125645	20741	14632	19244	13322	226542	12.6
Notes								
Other: No Weight Avail. ($000)		7523		980		761	8768	15.6
Total Exports Incl. Other($000)		2578949		320442		301331	3296237	28.5

* Hard Pressed Board (not in total)								
Imports of Hard Pressed Board	295729	40483	23687	4157	20880	3283	260984	-11.5
Exports of Hard Pressed Board	25571	8541	2823	917	1617	673	33087	29.5

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1977	YEAR 1978	JULY 1979	AUG. 1979	SEPT 1979	OCT. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PAPER					R	P		
Newsprint	3525	3535	291	342	299	351	3731	5.0
Uncoated Groundwood Papers	1578	1525	130	141	133	152	1675	9.6
Coated Papers	4189	4514	386	419	373	413	4662	2.8
Uncoated Free Sheet (1)	6914	7358	585	647	602	680	7498	1.4
Cotton Fiber Paper (1)	118	119	9	11	10	11	128	8.9
Thin Papers	362	354	29	33	31	31	380	7.4
Bleached Bristols	1034	1094	84	102	92	95	1126	2.9
Tissue Paper	4262	3957	356	385	343	392	4353	8.5
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3980	3887	313	342	327	358	3915	-1.6
Other Paper (1)	1529	1385	137	158	141	152	1761	26.2
TOTAL PAPER GRADES	27491	27729	2319	2579	2352	2634	29228	4.5
PAPERBOARD								
Solid Wood Pulp Furnish	21689	21536	1874	2006	1816	2021	22900	5.7
Unbleached Kraft Linerboard	12880	13127	1132	1205	1076	1224	13780	4.3
Other Unbl. Kraft Paperboard	820	880	90	89	76	71	1025	16.4
Bleached Kraft Paperboard	3851	3604	317	357	327	358	3927	7.7
Semi-Chemical Paperboard	4139	3924	336	354	337	368	4167	5.8
Recycled Paperboard	7036	7187	513	616	592	661	7218	-0.6
TOTAL PAPERBOARD GRADES	28725	28723	2387	2622	2408	2681	30117	4.1
WET MACHINE BOARD	128	142	8	13	13	15	137 R	-4.3
CONSTR. PAPER & INSUL. BOARD	3286	3374	254	304	264	299	3391	0.4
TOTAL ALL GRADES [Excl. H.P.B.]*	59630	59967	4968	5518	5037	5629	62873	4.1

PRODUCER PRICE INDEXES

1967 = 100

	1977	1978	SEPT	OCT.	NOV.	DEC.		
Pulp, Paper and Products	186.4	195.6	222.8	227.2	229.3	231.0	218.9	11.9
Pulp, Paper & Products, except Waste Paper #	186.4	195.6	223.1	227.5	229.5	231.2	219.1	12.0
Total Wood Pulp	281.1	266.5	320.6	339.4	339.9	339.9	314.8	18.1
Total Paper	194.3	206.1	230.6	239.0	242.1	243.0	229.7	11.5
Total Paper, exc. Newsprint	187.2	199.4	225.0	231.3	234.5	234.7	222.9	11.8
Newsprint	215.5	226.3	247.7	262.1	265.1	268.2	249.9	10.4
Total Paperboard	176.2	179.6	209.5	211.2	212.8	215.4	202.1	12.5
Total Paper and Paperboard #	188.7	197.8	224.0	230.3	232.9	234.3	221.0	11.7
Converted Products	176.6	186.5	213.9	216.5	218.4	220.3	209.6	12.4
Waste Paper	187.2	191.2	206.7	206.7	220.0	221.2	206.6	8.1
All Commodities	194.2	209.3	241.7	245.2	246.9	249.4	235.4	12.5
Industrial Commodities	195.1	209.4	243.8	248.5	250.2	252.8	236.3	12.8

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. # Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

Total production of containerboard for domestic use rose 5.6% over its year-ago level, compared to an estimated 2.8% increase in shipments of fiber boxes. The difference in the growth pattern reflected changing patterns of inventories at paperboard mills and box plants. In 1978 inventories at paperboard mills and box plants were reduced by nearly 500,000 tons; the December 1, 1979 level of these inventories were close to their year-end 1978 level. At the present time inventories at mills and box plants are at fairly low levels.

Total boxboard production for domestic use did not quite match its year-ago total, with bleached and recycled folding boxboard each holding very close to their 1978 levels and set-up boxboard off about 3.5%. Solid bleached paperboard production also remained in a flat trend from 1978 to 1979. Milk carton stock rose slightly, but the other food service grades, except folding boxboard showed declines. Bleached kraft exports increased slightly, "Other" uses of bleached board rose 17%.

Capital Expenditures

The strong demand for paper and paperboard evident in 1979 is reflected in major increases in capital expenditures. Recent announcement by the Department of Commerce noted that paper industry companies, which spent $4.84 billion in new plant and equipment in 1979, would increase these expenditures by 23% to $5.96 billion in 1980. This is one of the largest increases expected among the various industries covered. Commerce reported that total expenditures on plant and equipment for all business would rise by 10.9%, to a level of $196 billion. Commerce further pointed out that they expected real growth in capital expenditures to be in the 1% to 2% range.

Raw Materials

The Wood Pulp Division of the API reports that total production of wood pulp in the first eleven months of 1979 was at an annual rate of 50.5 million tons, up 5.2% from the 1978 total. Dissolving pulp production, used for rayon, acetate, and other non-paper products showed a 5%

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gain. However, in this sector imports fell by 5%, exports, which are about four times as large as imports, dropped 3%, with the result that new supply rose by 10%, pointing to a strong domestic market for these products. The chemical paper grades of wood pulp showed a 4% gain, which was only a little below the increase in total paper and paperboard production.

Among the market pulp grades, preliminary data indicate that production of chemical paper grade market pulp in 1979, at 4.15 million tons, was nearly 13% above the year-ago total. In this sector, exports, at 1.86 million tons, were some 15.5% over their year-ago level, while imports, at about 2.7 million tons, showed a 10% gain. Thus, domestic demand for chemical paper grade pulps exceeded 5 million tons for a gain of 10%. These were all record-high figures and were consistent with the strong demand for printing/writing papers, a major market for these pulps.

Waste Paper

The API publishes monthly estimates of waste paper consumption at paper and board mills in the table on page 5 and on the Industry Data Sheet. These estimates are based on weekly data collected by the API and cover about 55% of the total waste paper used in the U.S. In addition, the API collects annual data on waste paper consumption at all paper and paperboard mills, as part of its annual survey of capacity. Based on this latter report, it appears that total consumption of waste paper at paper and paperboard mills in 1979 amounted to 15.4 million tons, about 4% over the 14.76 million tons used in 1978.

The Department of Commerce reports on exports of waste paper. Based on eleven months data we estimate these exports at 2.1 million tons. Use of waste paper for molded pulp products, insulation, cushioning and other products, amounted to another 500,000 tons net of waste paper imports. These figures show that total waste paper collections in 1979 reached 18 million tons which was equivalent to 25.6% of the total new supply of paper and paperboard products in 1979, and about 32% of the paper and paperboard supply available for recycling.

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

JANUARY 17, 1980

	PRODUCTION (000 TONS)					
	Dec. 1979	Nov. 1979	Dec. 1978	Jan - Dec. 1979	1978	% Change 79/78
PAPER GRADES	P	R				
Newsprint	355	367	309	4109	3768	9.1
Uncoated Groundwood (s)	115	129	111	1472	1309	12.5
Coated Paper (s)	337	381	334	4481	4448	0.7
Uncoated Free Sheet Paper (s)	600	665	578	7832	7225	8.4
Thin Paper (c)	29	31	28	377	354	6.4
Cotton Fiber Paper (s)	10	11	9	126	114	9.8
Bleached Bristols (c)	90	96	88	1124	1095	2.7
Tissue Paper	350	374	328	4540	4215	7.7
Unbleached Kraft Packaging & Indl. Converting (s)	310	336	296	3971	3884	2.3
Other Paper (c)	135	140	111	1742	1430	21.8
TOTAL PAPER	2331	2529	2192	29774	27842	6.9
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1039	1190	960	13937	13228	5.4
Other Kraft Paperboard	59	109	71	1204	1145	5.2
Semichemical Paperboard	347	398	338	4694	4439	5.7
Bleached Paperboard	285	342	284	3985	3979	0.2
Recycled Paperboard	567	631	561	7624	7485	1.9
TOTAL PAPERBOARD	2298	2669	2213	31445	30275	3.9
CONSTRUCTION & WET MACH GRADES(c)	252	288	276	3479	3515	-1.0
TOTAL PAPER AND PAPERBOARD	4881	5486	4682	64698	61632	5.0
HARD PRESSED BD.[not in total](c)	155	175	157	2150	2180	-1.4

WOOD PULP (ALL GRADES)	Nov. 1979	Oct. 1979	Nov. 1978	Jan - Nov. 1979	1978	% Change 79/78
Dissolving & Special Alpha	130	148	108	1379	1314	5.0
Bleached Sulphite	121	126	95	1258	1333	-5.6
Unbleached Sulphite	33	35	32	366	299	22.7
Bleached & Semi-Bl. Sulph.	1561	1608	1424	16663	15831	5.3
Unbleached Sulphate	1647	1722	1586	18092	17511	3.3
Semichemical	435	442	350	4422	3714	19.1
Groundwood and Thermo-Mechanical	378	389	371	4112	4009	2.6
TOTAL PULP DIVISION DATA	4304	4470	3965	46293	44011	5.2
Defib. Exploded & Scrngs E	254	289	261	2916	2912	0.1
TOTAL WOOD PULP PRODUCTION	4559	4759	4226	49209	46922	4.9

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments R - Revised E - Estimate
P - Preliminary (c) - Census Data - Production, last 2 months estimated.

January 25, 1980

	Full Year		INDUSTRY DATA			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1977	1978	October	November	December		
Total Production (API).......! ! ...	59778	61632	5738	5486	4881	64698	5.0
Total Seasonally Adjusted....! excluding !...			5406	5476	5455	64778	5.0
Imports (including Products).!hard pressed!..E	7432	9117	767	787	737	9096	-0.2
Exports (including Products).! board !..E	3230	3373	340	310	283	3620	7.3
Apparent Consumption.........! !...	63980 a	67376 b	5833	5953	5909	70173 c	4.2
Paper Production % Tonnage Capacity...........	91.9 g	91.4 g	97.5	95.7	85.2	95.6 hg	-
Paperboard Production % Tonnage Capacity......	90.9 g	92.8 g	95.5	93.9	77.7	94.2 g	-
			September	October	November		
MARKET WOOD PULP PRODUCTION - Tons (000)........	4819	5165	482	532	509	5715	9.4
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	46652	47662	4088	4470	4304	50501	5.2
WOOD PULP IMPORTS - TONS (000)..................	3864	4025	323	358	373	4339	8.6
WOOD PULP EXPORTS - TONS (000)..................	2640	2599	275	265	255	2885	10.7
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			September	October	November		
Wood Pulp..(k)..............................	47596	48777	4171	4513	4368	51490	5.0
Waste Paper....(d)..........................	14058	14760	1246	1385	1397	15520	5.1
Other (Census).............................E	745	666	52	56	54	656	-2.1
Total................	62399	64203	5469	5953	5819	67666	5.0
..WOOD PULP - NON PAPER........................E	876	884	70	81	75	913	4.0
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	74807	77290	6448	7103	6723	80192	3.1
EMPLOYMENT (000)			October	November	December		
Paper and Allied Products..........Total......	691.6	700.9	717.7	715.8	716.4	714.3	1.9
Pulp, Paper and Board Mills........Total.....E	272.3	267.0	271.9	271.8	273.7	271.2	1.6
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products......................	5.96	6.52	7.34	7.41	7.45	7.11	9.1
Pulp, Paper Mills............................E	6.75	7.44	8.64	8.66	8.69	8.25	10.8
Paperboard Mills.............................E	6.94	7.68	8.68	8.81	8.66	8.37	9.0
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q2	1979 Q3	1979 Q4		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	3.36	3.46	4.80	4.68	5.09	4.84	40.0
INDEX OF OUTPUT PER MAN-HOUR (1967=100)..........			August	September	October		
!IN PULP, PAPER !...Production Workers.......RS	148.1	153.9	157.5	158.7	160.8	158.0 R	3.4
!AND BOARD MILLS!...All Employees............RS	144.0	148.4	151.8	152.9	155.0	152.3 R	3.1
PAPER AND ALLIED PRODUCTS (Million $)			September	October	November		
Industry Shipments (Dept. of Commerce)*.......	52368	57654	5544	5641	5576	66033	14.7
Pulp, Paper and Paperboard*.................	23701	25343	2565	2598	2613	30044	19.0
Inventories (End of Period) - Total Industry*.	5628	5875	6422	6538	6622	6622	14.6
Pulp, Paper and Paperboard*.................	2102	2006	2137	2198	2245	2245	11.7
			1979 Q1	1979 Q2	1979 Q3		
Sales (Corporations Only, FTC)................	45750	48982 RS	12997	13828	14133	54611	13.3
Earnings (Corporations Only, FTC).............	2367	2598 RS	867	917	1162	3928	58.0
Depreciation (Corporations Only, FTC)..........	1663	1726 RS	447	479	481	1876	9.8
Net Worth (Corporations Only, FTC)............	19704	20794 RS	21282	21808	22688	22688	12.3
PRICE INDEXES (Bureau of Labor Stats)1967=100			October	November	December		
Total Pulp, Paper and Allied Products.........	186.4	195.6	227.2	229.3	231.0	218.9	11.9
Wood Pulp....................................	281.1	266.5	339.4	339.9	339.9	314.8	18.1
Waste Paper..................................	187.2	191.2	206.7	220.0	221.2	206.6	8.1
Paper..	194.3	206.1	239.0	242.1	243.0	229.7	11.5
Paperboard...................................	176.2	179.6	211.2	212.8	215.4	202.1	12.5
PAPER DEMAND (INDEXED: 1967=100)			October	November	December		
Total Paper Production *.....................	131.0	133.1	144.7	145.1	140.4	142.3	6.9
Paper New Supply *...........................	124.0	131.2	139.2	141.0	132.8	137.6	4.9
Total End - Use Index *....................	134.4	139.5	144.6	144.7	145.5	144.6	3.6
Production of Nondurable Goods *...(19%)..	150.5	157.0	163.9	164.2	165.1	163.3	4.0
Disposable Income (Constant $) *...(23%)..	138.6	145.2	148.0	148.4	148.6	148.5	2.3
Total Printing and Publishing *...(58%)..	127.6	131.5	136.9	136.9	137.8	136.9	4.1
Trend Factor	---------------	---------------	---------------	-Not Available-	---------------	---------------	---------------
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production *................	127.0	132.8	136.0	139.4	142.8	138.0	3.8
Production for Domestic Use	271.3	227.3	133.8	137.0	142.6	136.4	3.8
Total End - Use Index *....................	141.6	147.7	151.4	150.7	151.0	151.6	2.6
Production of Consumer Goods *...(60.49%)	145.3	149.1	149.6	148.9	149.1	150.4	0.9
Production of Equipment *...(6.62%)	123.0	132.8	143.0	143.5	144.8	142.1	7.0
Production of Materials *...(32.89%)	138.6	148.3	156.4	155.6	155.8	155.9	5.2
Trend Factor	---------------	---------------	---------------	-Not Available-	---------------	---------------	---------------
NEWSPRINT MARKETS			September	October	November		
Consumption by Publishers - Tons (000)........	10228	10872	951	1019	1033	11235	4.2
Newspaper Pub. and Printing Emp. Total (000)..	395.6	407.4	421.8	424.4	428.4	419.9	3.3
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	106489	115184	10803	12172	12940	119533	3.8
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	15482	17586	1599	1821	1693	19719	12.3
Inventories (End of Period)	1261	1482	1663	1597	1663	1663	15.4
Paper Only..............................Sales	11799	13078	1202	1368	1271	14918	14.6
Inventories (End of Period)	873	1025	1109	1082	1110	1110	14.8
RETAIL TRADE (Million $)			October	November	December		
Total Retail Sales *.........................	724020	798818	75611	76175	77020	882004	10.4
Nondurable Goods Stores Sales *..............	476188	520902	50143	50927	51362	578851	11.1
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)*.	138.2	146.1	152.2	151.8	152.2	151.3	3.5
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	194.2	209.3	245.2	246.9	249.4	235.4	12.5
			September	October	November		
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	181.5	195.4	223.4	225.4	227.5	216.3	11.1
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	230.8	275.6	303.9	305.2	307.6	307.6	14.2
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1979 Q2	1979 Q3	1979 Q4		
G.N.P. or Expenditure - Current $.............	1899.5	2127.6	2329.8	2396.5	2455.8	2368.6	11.3
G.N.P. OR Expenditure - 1972 $................	1340.5	1399.2	1422.3	1433.3	1438.4	1431.2	2.3

lb/capita	Popul.(mil)
.a - 590	216.8
.b - 617	218.5
.c - 637	220.4

.d - 1977 - 12192; 1978 - 13185
. 1979 A.R. Jan-Oct - 13042
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1977 - 3,218; 1978 - 3,155; 1979 A.R.Y-T-D 3,181 (000 tons)
g - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '77 - 1,688; '78 - 1,655 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
* - Seasonally adjusted

A 2500-2

MONTHLY STATISTICAL SUMMARY

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Vol. 58 FEBRUARY 1980 No. 2

Paper Industry Trends: Early 1980

Paper and paperboard production in January 1980 remained at the high levels established in 1979, holding close to practical capacity levels. On a seasonally adjusted basis, paper production matched its average 1979 level while paperboard production exceeded its average 1979 level by about 4%.

Comparisons of January 1980 production with year-ago levels, shown on the Industry Fact Sheet and on the table on page 3, must be used with caution inasmuch as the production rate in January 1979 was still affected by strikes at several paper and paperboard mills. Measured against the average 1979 levels, production of newsprint and other printing and writing papers is still in a rising trend. Newsprint production in January 1980 was about 11% over its 1979 average, reflecting the introduction of three new machines in the last half of 1979. The other printing and writing papers were about 3-½% over their 1979 average, with the gain concentrated in the uncoated free sheet and in total coated papers. January new orders for uncoated free sheet papers remained at the high levels established in the Spring of 1979, following conclusions of the strikes. New orders for both coated papers and uncoated groundwood papers moved well above their respective 1979 levels.

As noted in the January 1980 Monthly Statistical Summary, API is no longer collecting

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weekly data on paperboard production by market categories, i.e., in terms of containerboard and boxboard grades, but continues to collect & publish weekly data on production of paperboard by furnish, i.e., unbleached kraft, semichemical, bleached kraft and recycled paperboard. API is also continuing to collect the market category data on a monthly basis. The data in the table on page 3 have been expanded to summarize this information.

The 1979 total production reported in the monthly system, which was 0.6% higher than the total based on the weekly data, has been incorporated in the 1979 data. The 1978-1979 gain in total paperboard production is now shown as 4.5%. Total production of paper and paperboard in 1979 is now estimated at 64,883,000 tons, 5.3% ahead of the 61,632,000 tons produced in 1978.

Total production of containerboard for domestic use in January 1980 was about 1.9% over its average 1979 level, compared to a 5% gain in shipments of corrugated shipping containers. Production of kraft linerboard for export was particularly strong; the January 1980 total of 175,000 tons compares with the 1979 average monthly level of 135,000 tons. Moreover, kraft linerboard exports in 1979 marked the highest total since 1972.

Compared to its average 1979 level, the January 1980 boxboard production rose 2.7%, with the gain concentrated in the bleached paperboard grades. This may mark a turnaround situation, in that bleached paperboard production in 1979 was only 1.1% ahead of its 1978 total. Production of bleached paperboard for export was also strong, with the January 1980 level about 8% above its average 1979 level.

Imports and Exports

Imports of paper, paperboard and products in December 1979 held close to the level of the preceding months, and in fact, just about matched the 1979 average level. Total imports in 1979 of paper, paperboard and products amounted to 9.1 million tons, almost equal to the 1978 figure.

Newsprint constitutes, by far, the largest single component of these imports. Newsprint imports in 1979 declined by 3-½%, reflecting in part, supply problems in Canada. Imports of uncoated groundwood papers rose 54% over the year-ago total, reflecting the increases in demand for such uses as newspaper advertising inserts and periodicals.

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PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

	YEAR 1978	YEAR 1979	OCT. 1979	NOV. 1979	DEC. 1979	JAN. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint - Production	3768	4062	368	364	339	376	4507	19.1
- Shipments	3779	4066	368	361	347	369	4424	16.9
Printing & Writing	14545	15461	1383	1304	1240	1333	15994	8.1
Groundwood Paper - Shipments	1309	1474	133	128	118	119	1433	5.0
- New Orders	1367	1470	139	104	107	155	1865	19.1
- Unfilled Orders	179	181	207	190	181	193	193	7.8
Coated Paper - Shipments	4448	4510	406	381	366	397	4759	9.1
- New Orders	4428	4521	378	401	366	451	5412	15.1
- Unfilled Orders	404	434	408	442	434	449	449	11.5
Unctd Free Sheet - Shipments	7225	7868	708	667	635	681	8172	9.4
- New Orders	7542	7797	678	637	595	696	8347	6.0
- Unfilled Orders	754	679	730	749	679	670	670	-9.3
Thin Paper - Production *	354	377	31	32	29	31	372	1.0
Cotton Fiber Paper - Shipments	114	125	11	11	10	12	142	15.7
Bleached Bristols -Production*	1095	1107	95	86	83	93	1116	0.4
Tissue Paper - Production	4215	4523	397	372	335	370	4440	3.1
Total Packaging & Other Paper	5314	5748	507	498	450	468	5615	3.0
Unbl. Kraft Paper - Shipments	3884	3963	348	333	305	308	3695	-2.9
Other Paper - Production * #	1430	1785	160	165	145	160	1920	16.7
TOTAL PAPER-Production-Unadj.	27842	29794	2656	2537	2364	2546	30556	7.8
-Production-S.A.			2529	2540	2485	2489	29d69	7.8
PAPERBOARD - PRODUCTION							**	
Solid Wood Pulp Furnish	22790	23947	2137	2047	1774	2087	25043	8.1
Unbl. Kraft Linerboard - Total	13228	14076	1280	1209	1064	1212	14546	7.1
Production for Export	1466	1621	142	160	120	175	2102	43.5
Other Unbl. Kraft Paperboard	1144	1127	94	101	58	105	1258	1.1
Semichemical Paperboard	4439	4721	414	395	358	424	5082	13.0
Production for Export	119	92	7	7	4	11	127	33.3
Solid Bleached Paperboard	3979	4023	350	343	295	346	4157	8.2
Production for Export	430	466	41	40	32	42	503	41.1
Recycled Paperboard	7485	7683	684	667	572	652	7824	0.7
Production for Export	22	22	1	2	3	2	26	43.0
TOTAL PAPERBOARD-Prod.-Unadj.	30275	31631	2821	2714	2346	2739	32867	6.2
- Containerboard Prod.(Dom. Use)	17908	19031	1718	1614	1460	1616	19387	5.6
- Boxboard Production (Dom. Use)###	6505	5897	514	488	428	505	6059	2.4
- All Other P'bd Prod.(Dom. Use)###	3825	4503	398	403	299	389	4664	-0.8
- Total Paperbd Prod. for Export	2037	2200	192	210	15[illegible]	230	2758	42.6
TOTAL PAPERBOARD PROD. - S.A.			2632	2695	2773	2739	32867	6.2
WET MACHINE BOARD *	142	141	15	14	13	15	174	64.8
BUILDING PAPERS *	1956	1891	168	148	135	140	1680	-8.9
INSULATING BOARD *	1417	1427	131	109	100	100	1200	-16.2
TOTAL ALL GRADES - Unadjusted	61632	64883	5791	5522	4957	5540	66476	6.1
- Production - S.A.			5456	5511	5541	5507	66081	6.0
HARD PRESSED BD. [not in total]*	2180	2141	201	165	155	165	1980	-0.9

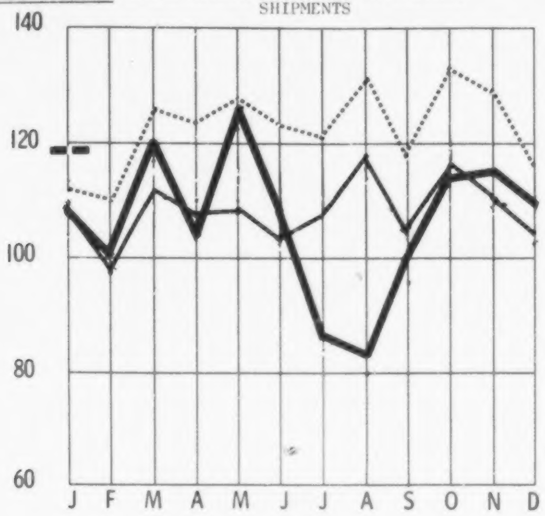
* Census Data - Production. Last two months estimated.
# Production excludes API bleached kraft envelope.
## Includes revisions not available monthly.
### Data on unbleached kraft folding boxboard for 1979 and 1980 included in All Other.

S.A. Seasonally Adjusted
P Preliminary
R Revised

THOUSANDS OF TONS

GROUNDWOOD PAPER, UNCOATED

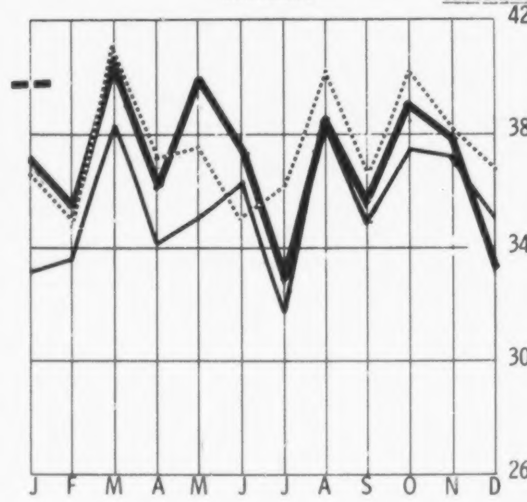
SHIPMENTS



COATED PAPER

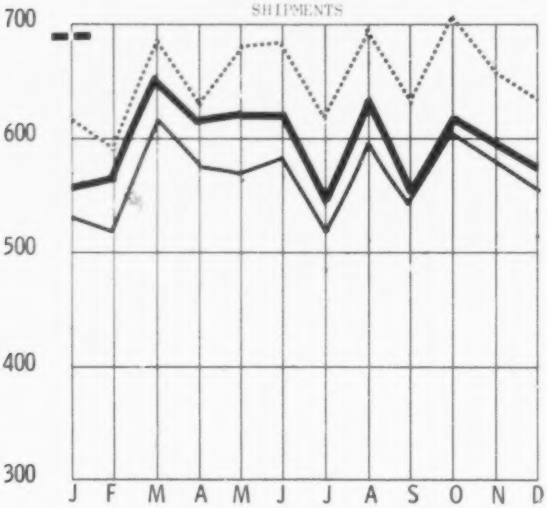
SHIPMENTS

THOUSANDS OF TONS



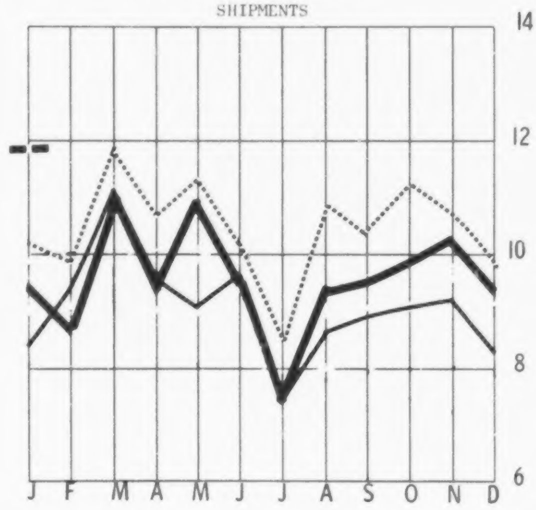
UNCOATED FREE SHEET PAPERS

SHIPMENTS



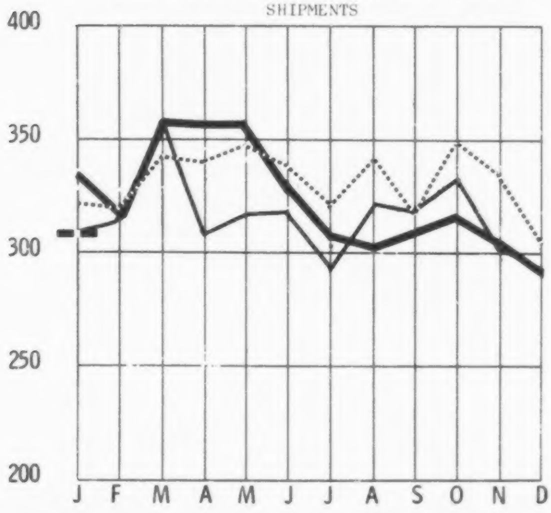
COTTON FIBER PAPER

SHIPMENTS



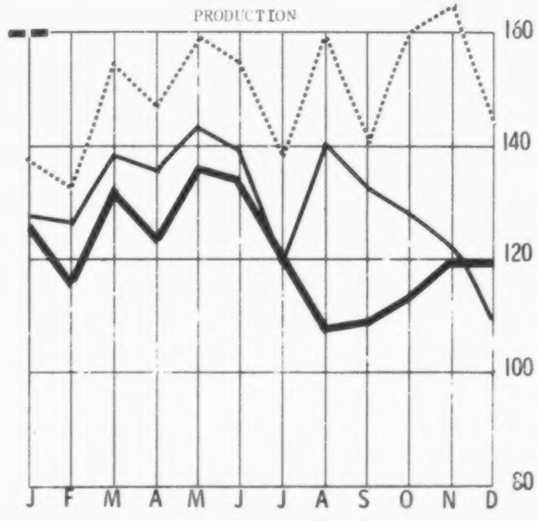
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1977 —— 1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

WOOD PULP STATISTICS

(Thousands of Tons)

	YEAR		SEPT	OCT.	NOV.	DEC.	Annual Rate Y-T-D	% Change from same Period Last Year
	1977	1978	1979	1979	1979	1979	1979	
TOTAL WOOD PULP (1)					R	P		
Total Wood Pulp - Production	46652	47228	4045	4419	4255	3874	49715	5.3
- Imports	3864	4025	323	358	373	347	4324	7.4
- Exports	2640	2599	275	265	255	290	2935	12.9
- New Supply	47877	48653	4093	4512	4373	3931	51104	5.0
Dissolving Pulp - Production	1467	1411	109	148	130	118	1497	6.1
- Imports	181	189	24	9	20	22	193	2.4
- Exports	796	758	63	64	67	75	764	0.9
- New Supply	852	842	69	93	83	64	926	9.9
Paper Grades Chemical Pulp - Production	36897	37893	3229	3527	3410	3092	39766	4.9
- Imports	3481	3627	285	333	340	311	3930	8.3
- Exports	1763	1780	203	193	180	209	2100	18.0
- New Supply	38615	39740	3311	3667	3570	3194	41595	4.7
Groundwood and Thermo-Mech. - Production	4403	4141	363	382	371	355	4385	5.9
- Imports	203	208	14	16	13	14	201	-3.4
- Exports	81	62	8	8	8	6	70	12.9
- New Supply	4525	4287	369	389	376	364	4516	5.3
Semi-Chemical - Production	3886	3783	345	363	344	310	4068	7.5
- Imports	0	0						
- Exports	0	0	------ Included with Groundwood Pulp ------					
- New Supply	3886	3783	345	363	344	310	4068	7.5
MARKET WOOD PULP								
Total Market Wood Pulp - Production	4819	5165	482	532	509	485	5723	10.8
- Imports	2684	2816	227	251	265	233	3046	8.2
- Exports	2359	2480	287	231	249	262	2784	12.3
- New Supply	5144	5501	421	552	525	456	5985	8.8
Dissolving Pulp - Production	1465	1406	108	147	130	117	1497	6.4
- Imports	256	291	28	13	25	16	306	5.0
- Exports	798	824	87	63	77	86	869	5.4
- New Supply	923	873	49	97	78	48	934	6.9
Paper Grades Chemical Pulp - Production	3263	3675	367	378	372	362	4163	13.3
- Imports	2394	2495	198	237	240	217	2734	9.6
- Exports	1515	1613	198	164	168	173	1870	15.9
- New Supply	4143	4557	368	452	444	405	5027	10.3
Groundwood Pulp and All Other - Production	90	83	7	6	7	6	63	-24.3
- Imports	35	26	0	2	0	0	7	-74.6
- Exports	46	42	2	4	4	4	46	8.6
- New Supply	80	67	5	3	3	2	24	-64.5

(1) Prodctn excludes defibrated, explodeo & screenings-(000 tons): 1977 - 3218; 1978 - 3155;A.R.Y-T-D'79 - 3130

SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

FIBROUS RAW MATERIALS

(Thousands of tons)

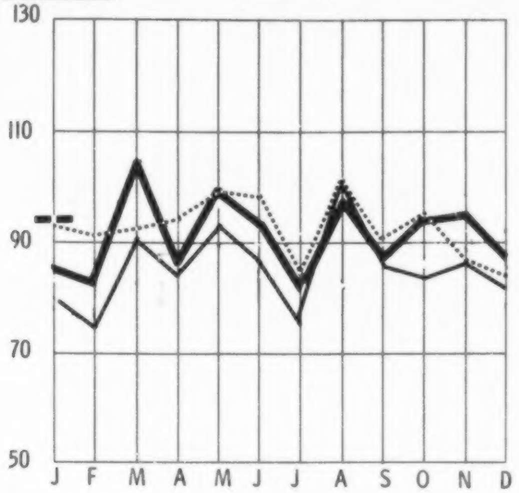
CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	62399	63776	5427	5900	5734	5157	66703	4.6
Total Wood Pulp (2) A	47596	48350	4129	4462	4286	3935	50658	4.8
Market Wood Pulp A	4216	4774	395	441	414	360	4993	4.6
Waste Paper (3) A	14058	14760	1246	1385	1397	1173	15400	4.3
Rags, Straw & Other C, E	745	666	52	54	51	49	645	-3.2
INVENTORIES								
Wood Pulp at Pulp Mills A	193	130	114	112	117	107	107	-17.4
Market Pulp at Pulp Mills A	277	187	146	152	158	132	132	-29.2
Mkt Pulp at Ppr.& Bd. Mills CE	404	435	386	390	401	410	410	-5.8
Waste Ppr.at Ppr.&Bd. Mills CE	728	740	633	642	632	665	665	-10.1
Rags, Straw and Other at Paper and Board Mills C, E	67	66	62	61	61	60	60	-9.1
Mkt Wood Pulp Days of Supply A	55	44	37	36	38	37	37	-17.2
Wood Pulp Consumption at at Non-Paper Mills C, E	876	884	70	79	73	73	906	2.5

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.: 1977 - 1,688,000; 1978 - 1,655,000 ton
(3) Census Waste Paper Consumpt.(000 tons): 1977 - 12192; 1978 - 13185; 1979(Annual Rate Jan-Oct) 13108

THOUSANDS OF TONS

BLEACHED BRISTOLS

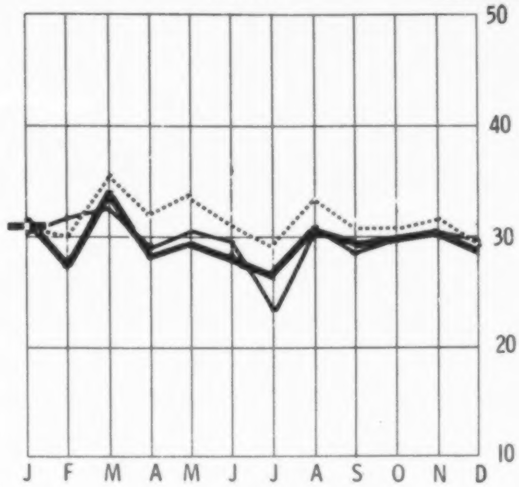
PRODUCTION



THIN PAPERS

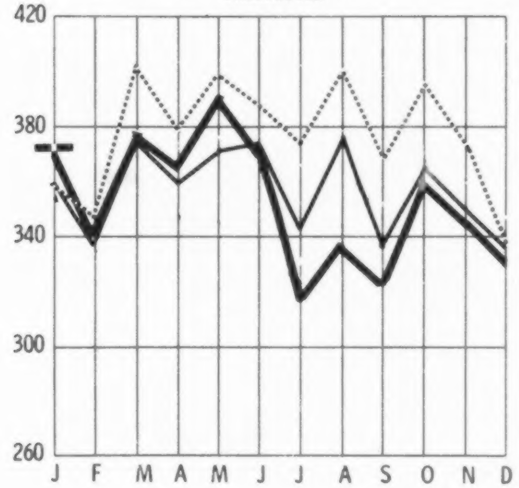
PRODUCTION

THOUSANDS OF TONS



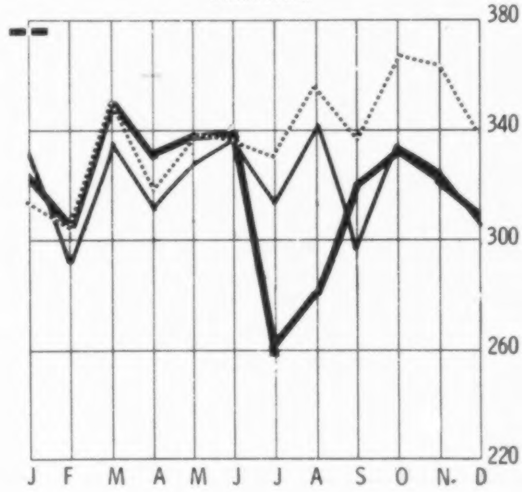
TISSUE PAPER

PRODUCTION



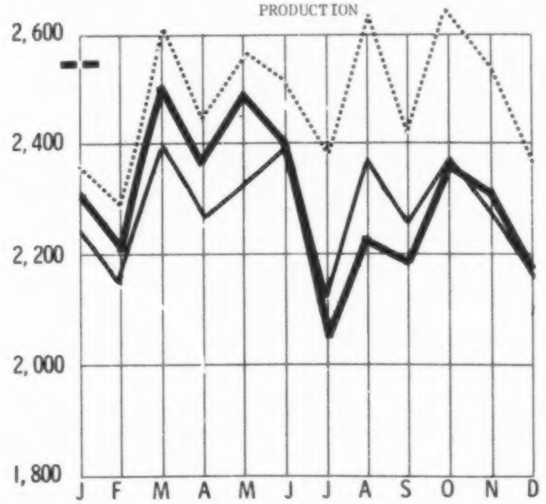
NEWSPRINT

PRODUCTION



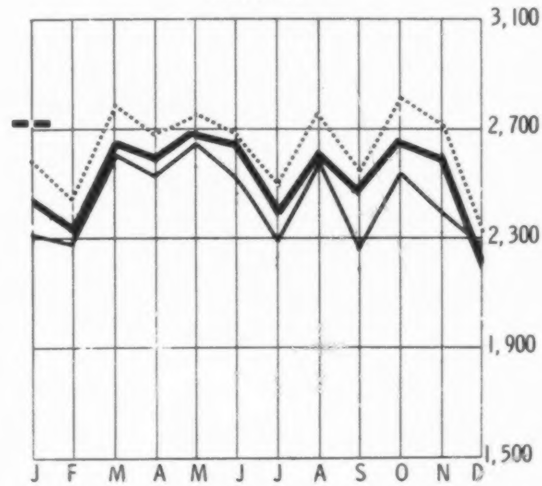
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1977 —— 1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1977	YEAR 1978	SEPT 1979	OCT. 1979	NOV. 1979	DEC. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	74034	77025	6465	7505	6557	6479	78625	2.1
	- Total Consumpt.	74807	77290	6448	7103	6723	6057	79566	2.9
	- Residues *	30112	30369	2444	2915	2317	2150	30015	-1.2
	- Inventories	6187	6244	4943	5320	5110	5506	5506	-11.8
So. Atlantic	- Total Receipts	23727	25353	2080	2393	2202	2103	26126	3.0
	- Total Consumpt	23820	25204	2194	2385	2240	1934	26523	5.2
	- Residues *	7880	8513	698	807	718	673	8858	4.1
	- Inventories	1003	1191	894	911	880	1052	1052	-11.7
Northeast	- Total Receipts	5954	6664	611	649	662	618	7461	12.0
	- Total Consumpt	6250	6607	554	661	681	595	7584	14.8
	- Residues *	1426	1662	129	143	147	113	1670	0.5
	- Inventories	584	770	684	680	654	674	674	-12.5
South Central	- Total Receipts	24367	25572	2157	2568	2178	2225	26654	4.2
	- Total Consumpt	24394	25678	2096	2308	2154	1999	26432	2.9
	- Residues *	8415	8418	673	787	655	616	8669	3.0
	- Inventories	1279	1194	979	1243	1281	1472	1472	23.3
North Central	- Total Receipts	4996	5291	480	518	452	569	5630	6.4
	- Total Consumpt	5261	5330	438	448	474	430	5535	3.8
	- Residues *	1430	1456	126	142	138	117	1501	3.1
	- Inventories	1029	968	832	885	857	993	993	2.6
West	- Total Receipts	14990	14145	1137	1377	1063	964	12754	-9.8
	- Total Consumpt	15082	14471	1166	1301	1174	1099	13492	-6.8
	- Residues *	10961	10320	818	1036	659	631	9317	-9.7
	- Inventories	2292	2121	1554	1601	1438	1315	1315	-38.0

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1978 Tons	YEAR 1978 $000	NOV. 1979 Tons	NOV. 1979 $000	DEC. 1979 Tons	DEC. 1979 $000	Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	267517	11155	16647	704	16019	678	206050	-23.0
Pulpwood Chips	1817114	34737	137231	2838	105429	2352	1527734	-15.9
Wood Pulp, Total	3847590	1041860	348591	128864	340030	125530	4143944	7.7
Waste Fibrous Materials, Total	99872	13581	8374	1296	3083	427	88344	-11.5
Paper,Paperboard&Products,Total	8666058	2496771	735815	258585	723425	252471	8501965	-1.9
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8625089	2454161	731663	253800	719940	247556	8457803	-1.9
Paper, Total	8209265	2382065	699763	246728	684269	239975	8015574	-2.4
Newsprint	7477824	2108925	618252	210180	622835	211151	7077209	-5.4
Printing,Writing & Rel.Pap.	592897	215790	71737	31397	49358	22122	799355	34.8
Pack. & Ind. Conv. Paper	126672	50896	8615	4269	10746	5827	118815	-6.2
Special Industrial Paper	556	595	352	444	188	260	3157	467.3
Tissue Paper	11315	5860	808	438	1142	614	17039	50.6
Paperboard, Total	97162	16488	7679	1896	9705	2537	80636	-17.0
Wet Machine Board	1437	758	35	19	184	91	1522	5.9
Construction Paper and Bd. *	317225	54849	24187	5158	25781	4952	360071	13.5
Convtd Paper&Paperbd Products	40970	42611	4151	4786	3486	4915	44163	7.8

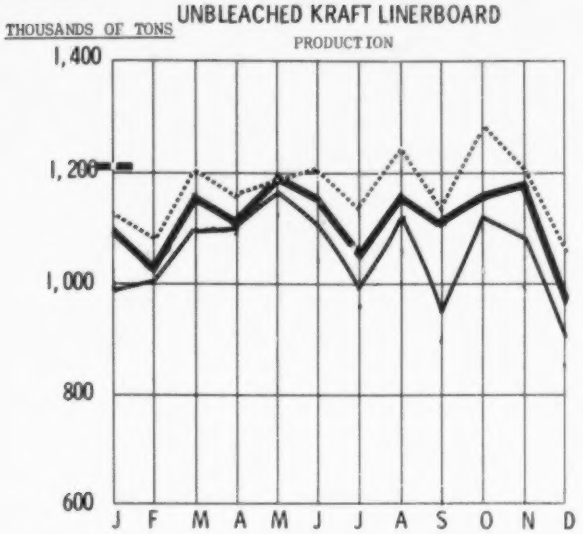
EXPORTS TO CANADA

	YEAR 1978 Tons	YEAR 1978 $000	NOV. 1979 Tons	NOV. 1979 $000	DEC. 1979 Tons	DEC. 1979 $000	Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	216233	8823	16611	814	12201	630	263367	21.8
Pulpwood Chips	89406	4695	3404	82	1021	32	87790	-1.8
Wood Pulp, Total	98813	32570	14825	5707	8834	3476	136641	38.3
Cotton Pulp & Other Pulp	12291	4437	688	419	586	217	7921	-35.6
Waste Paper	341671	33467	37143	4098	44313	3812	478477	40.0
Paper,Paperboard&Products,Total	667324	356156	55165	31583	44540	24684	624928	-6.4
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	469501	232442	39235	21302	34505	17256	454029	-3.3
Paper, Total	196765	143884	16586	12558	14812	10238	181451	-7.8
Newsprint	2368	1794	177	135	110	94	2803	18.4
Printing,Writing & Rel.Pap.	115565	80005	8185	6089	8580	5629	108290	-6.3
Pack. & Ind. Conv. Paper	28732	13338	1084	1057	1060	761	16084	-44.0
Special Industrial Paper	40579	41156	6725	4887	4795	3482	46773	15.3
Tissue	9522	7592	415	390	267	272	7502	-21.2
Paperboard, Total	220964	70738	19834	7430	17056	5880	230904	4.5
Wet Machine Board	4906	2446	288	184	351	195	5262	7.3
Construction Pap. & Bd. E *	46866	15374	2526	1129	2287	944	36411	-22.3
Convtd Paper&Paperbd Products	197823	123714	15930	10281	10035	7428	170900	-13.6
* - Hard Pressed Board (not in total)								
Imports of Hard Pressed Bd.	22803	3622	3895	706	2521	449	29771	30.6
Exports of Hard Pressed Bd.	18926	5216	1075	371	1028	378	20535	8.5

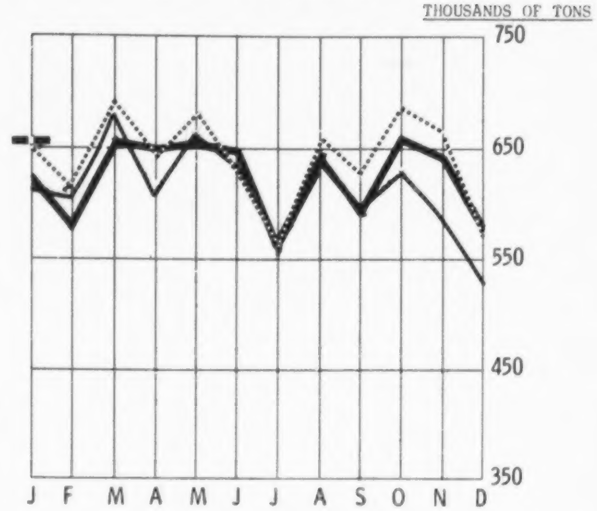
SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

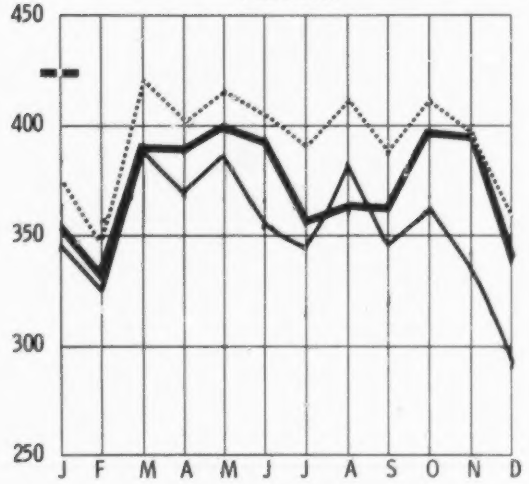


RECYCLED PAPERBOARD



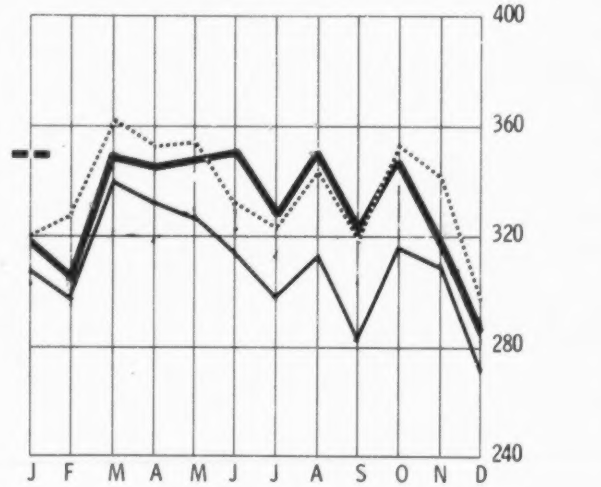
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



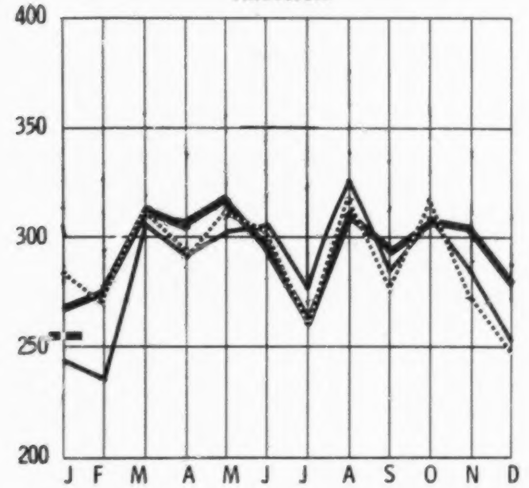
SOLID BLEACHED PAPERBOARD

PRODUCTION



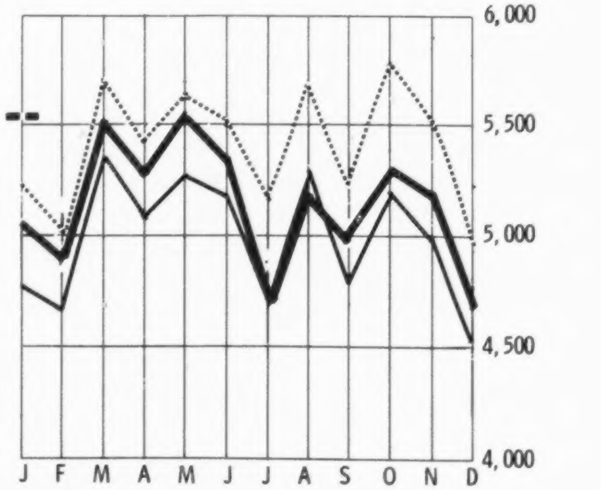
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1977 ——— 1978 ━━━ 1979 ········ 1980 ▬ ▬ ▬

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1978 Tons	YEAR 1978 $000	NOV. 1979 Tons	NOV. 1979 $000	DEC. 1979 Tons	DEC. 1979 $000	(1) Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	270662	11481	16647	704	16019	678	206074	-23.9
Pulpwood Chips	1819169	34864	137231	2838	105429	2352	1574763	-13.4
Total All Imports	13267526	3926572	1169601	433503	1117020	414524	13554749	2.2
Wood Pulp, Total	4024560	1086438	373119	136904	347070	127965	4324033	7.4
Waste Paper	69440	7253	7426	1089	1985	176	62310	-10.3
Other Fibrous Materials	56093	16854	2486	938	1877	874	43640	-22.2
Paper,Paperbd&Products,Total	9117433	2816028	786569	294572	766089	285508	9124767	0.1
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9024340	2640421	777778	273144	758851	266523	9028643	0.0
Paper, Total	8591929	2562762	743630	265491	720535	258443	8561213	-0.4
Newsprint	7483720	2111648	635558	216843	635659	216690	7224195	-3.5
Printing & Writing	958157	385371	97517	42619	72085	34303	1176253	22.8
Uncoated Groundwood	521602	177010	72582	27419	47041	18925	804598	54.3
Uncoated Book	203204	78744	8868	4733	8924	4740	142674	-29.8
Coated Print.& Impreg. Pap	213658	109204	11387	6742	12403	7560	188846	-11.6
Bristols	618	427	76	51	88	66	2247	263.7
Writing and Similar Paper	11748	14284	3252	2634	2040	1812	22964	95.5
Thin (except Cigarette)	7327	5703	1351	1040	1588	1199	14924	103.7
Total Pkg & Other Paper	138132	59377	9747	5592	11649	6836	143452	3.9
Unbleached Kraft Paper	64623	19296	4164	1625	4321	1718	66816	3.4
Other Pkg. & Indust. Paper	73509	40081	5584	3967	7328	5118	76636	4.3
Tissue	11920	6366	808	438	1142	615	17312	45.2
Paperboard, Total	100102	18283	7750	1967	9772	2604	82203	-17.9
Test or Containerboard	31860	5185	3069	770	5496	1437	25725	-19.3
Semi-Chemical Corrugating	48027	7412	2278	415	1656	313	33494	-30.3
Other Paperboard	20215	5685	2403	782	2619	854	22984	13.7
Wet Machine Board	2717	1497	118	99	232	142	2345	-13.7
Construction Paper & Bd. *	329593	57879	26281	5587	28314	5334	382883	16.2
Building Paper	271870	47017	21790	4604	24049	4326	330147	21.4
Insulating Board	25392	4997	1824	375	1132	263	21682	-14.6
Other Building Board	32331	5865	2667	608	3133	746	31054	-3.9
Convtd Paper&Paperbd Products	93093	175607	8791	21428	7237	18985	96124	3.3
Paper Products, Total	86791	164651	8348	20568	6784	17987	90317	4.1
Paperboard Products, Total	6302	10956	443	860	453	998	5807	-7.9
Notes								
Other: No Weight Avail. ($000)		78967		7094		6245	81899	3.7
Total Imports Incl. Other($000)		4005539		440597		420769	4775506	19.2

EXPORTS

	YEAR 1978 Tons	YEAR 1978 $000	NOV. 1979 Tons	NOV. 1979 $000	DEC. 1979 Tons	DEC. 1979 $000	(1) Annual Rate Y-T-D 1979	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cu. ft.)	218270	8960	16611	814	12201	630	263721	20.8
Pulpwood Chips	3617574	156779	429312	20147	396600	17567	4498674	24.4
Total All Exports	7659628	2571426	781524	300570	868700	335516	8971542	17.1
Wood Pulp,Total	2598952	817102	255453	101273	289972	119547	2934818	12.9
Cotton Pulp and Other Pulp	88481	47987	10285	5837	13088	7944	131444	48.6
Waste and Old Paper	1599449	145884	205646	24696	230958	26434	2233246	39.6
Paper, Paperbd&Products, Total	3372746	1560452	310140	168763	334682	181591	3672034	8.9
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	2895732	1108079	260134	116275	285555	127955	3109390	7.4
Paper, Total	542675	415574	52457	44054	60022	47762	575936	6.1
Newsprint	82454	29947	10796	5090	9436	4706	71456	-13.3
Printing & Writing	266096	208801	19319	18634	24680	20933	274609	3.2
Uncoated Groundwood	58109	37154	5691	4943	6758	4871	80392	38.3
Clay Coated Paper	73592	54358	5693	4485	6225	4825	73521	-0.1
Uncoated Free Sheet	84896	66185	4496	4852	7163	6789	68159	-19.7
Other Printing & Writing	49500	51103	3440	4354	4534	4448	52537	6.1
Total Pkg. & Other Paper	172995	159013	20639	18551	23320	19710	201966	16.7
Unbleached Kraft	45442	17440	7495	3568	11086	4424	63695	40.2
Other Pkg. & Indust. Paper	127553	141573	13144	14983	12234	15287	138271	8.4
Tissue	21130	17814	1703	1779	2586	2413	27905	32.1
Paperboard, Total	2281653	662216	202954	69761	220971	77758	2471843	8.3
Solid Wood Pulp	2078118	576605	188083	63320	208694	72110	2296032	10.5
Total Linerboard	1539510	344110	126238	35130	153729	45491	1644901	6.8
Bleached Kraft Linerboard	194421	50671	5523	1916	19852	5930	179995	-7.4
Unbleached Kraft Linerbd	1345089	293439	120716	33215	133877	39560	1464906	8.9
Other Unbleached Kraft	65833	22330	11734	3913	9394	3407	100301	52.4
Other Bleached Kraft	440724	204423	46840	23288	44884	22876	533472	21.0
Semi-Chemical Corrugating	32051	5742	3271	988	687	336	17358	-45.8
Recycled Paperboard	203535	85611	14872	6440	12277	5648	175811	-13.6
Wet Machine Board	7554	4805	491	414	535	413	7371	-2.4
Construction Paper & Bd. *	63850	25485	4232	2047	4027	2024	54241	-15.0
Building Paper	37166	13220	2654	1219	2718	1299	33619	-9.5
Insulating Board E	26684	12265	1579	828	1309	725	20623	-22.7
Convtd Paper&Paperbd Products	477014	452373	50005	52488	49127	53636	562643	18.0
Paper Products, Total	274884	326728	30761	39166	26554	37736	332407	20.9
Paperboard Products, Total	202130	125645	19244	13322	22573	15899	230237	13.9
Notes								
Other: No Weight Avail. ($000)		7523		761		927	8964	19.2
Total Exports Incl. Other($000)		2578949		301331		336443	3357995	30.2
* Hard Pressed Board (not in total)								
Imports of Hard Pressed Board	295729	40483	20880	3283	21540	2946	260775	-11.8
Exports of Hard Pressed Board	25571	8541	1617	673	1700	703	32030	25.3

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1977	YEAR 1978	AUG. 1979	SEPT 1979	OCT. 1979	NOV. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PAPER					R	P		
Newsprint	3525	3535	342	299	365	356	3795	6.7
Uncoated Groundwood Papers	1578	1525	141	133	154	140	1677	9.5
Coated Papers	4189	4514	419	373	415	403	4680	3.3
Uncoated Free Sheet (1)	6914	7358	647	602	680	646	7521	1.6
Cotton Fiber Paper (1)	118	119	11	10	11	11	128	7.5
Thin Papers	362	354	33	31	31	32	380	7.0
Bleached Bristols	1034	1094	102	92	95	86	1117	1.7
Tissue Paper	4262	3957	385	343	392	360	4350	9.2
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3980	3887	342	327	359	363	3957	0.4
Other Paper (1)	1529	1385	158	141	160	165	1789	28.4
TOTAL PAPER GRADES	27491	27729	2579	2352	2661	2561	29394	5.3
PAPERBOARD								
Solid Wood Pulp Furnish	21689	21536	2006	1816	2030	1930	22934	5.6
Unbleached Kraft Linerboard	12880	13127	1205	1076	1226	1154	13788	4.0
Other Unbl. Kraft Paperboard	820	880	89	76	80	90	1039	18.8
Bleached Kraft Paperboard	3851	3604	357	327	358	355	3958	8.7
Semi-Chemical Paperboard	4139	3924	354	337	366	331	4148	5.1
Recycled Paperboard	7036	7187	616	592	668	612	7237	-0.2
TOTAL PAPERBOARD GRADES	28725	28723	2622	2408	2698	2542	30171	4.2
WET MACHINE BOARD	128	142	13	13	15	14	140	-1.7
CONSTR. PAPER & INSUL. BOARD	3286	3374	304	264	299	256	3363	-0.9
TOTAL ALL GRADES [Excl. H.P.B.]*	59630	59967	5518	5037	5674	5374	63068	4.4

PRODUCER PRICE INDEXES

1967 = 100

	1978	1979	OCT.	NOV.	DEC.	JAN.		
Pulp, Paper and Products	195.6	218.9	227.2	229.3	231.0	237.4	237.4	14.7
Pulp, Paper & Products, except Waste Paper ♦	195.6	219.1	227.5	229.5	231.2	237.6	237.6	14.8
Total Wood Pulp	266.5	314.8	339.4	339.9	339.9	358.8	358.8	23.2
Total Paper	206.1	229.7	239.0	242.1	243.0	245.5	245.5	12.7
Total Paper, exc. Newsprint	199.4	222.9	231.3	234.5	234.7	238.0	238.0	11.8
Newsprint	226.3	249.9	262.1	265.1	268.2	268.2	268.2	14.8
Total Paperboard	179.6	202.1	211.2	212.8	215.4	221.8	221.8	17.7
Total Paper and Paperboard ♦	197.8	221.0	230.3	232.9	234.3	238.1	238.1	14.3
Converted Products	186.5	209.6	216.5	218.4	220.3	227.5	227.5	14.7
Waste Paper	191.2	206.6	206.7	220.0	221.2	222.7	222.7	15.4
All Commodities	209.3	235.4	245.2	246.9	249.4	254.7	254.7	15.4
Industrial Commodities	209.4	236.3	248.5	250.2	252.8	260.3	260.3	18.4

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. ♦ Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

Imports of wood pulp, reflecting the strong demand for paper and board in the U.S., rose 7.4% from 1978 to 1979 to 4.3 million tons. About 4% of this total was dissolving wood pulp used outside the paper industry. Imports of paper grade wood pulp accounted for about 8% of the total consumption of wood pulp at paper and board mills. Total imports of pulp, paper and paperboard in 1979 were valued at $4.78 billion, 19% above the 1978 total.

The demand for paper and paperboard outside the U.S. was strong in 1979 and total U.S. exports of paper, paperboard and products rose 8.9%, to 3.67 million tons. The largest single export product is linerboard, and total linerboard exports, according to the Department of Commerce, amounted to 1.64 million tons, 6.8% above the year-earlier level. Total paper exports also showed a good increase and at 576,000 tons were up 6.1%. The strongest gains here were in the packaging grades and in uncoated groundwood papers.

Exports of wood pulp, as reported by the Department of Commerce, amounted to 2.9 million tons, 12.9% above the year-earlier level. The gain was concentrated in the paper grades. Dissolving pulp, which accounts for about one-fourth of the total, declined 1%. Waste paper exports, at 2.2 million tons, were 40% over their 1978 level. The total dollar value of all these exports amounted to $3.36 billion, 30% above the 1978 total.

New Supply

With imports flat and exports up, total new supply in 1979, at 70,336,000 tons, was 4.4% over the 1978 level, and 10% over the 64 million tons of new supply available in 1977. This is somewhat faster than the growth in economic activity; real GNP in 1979 was 2.3% over the 1978 level, and 6.8% over the 1977 level. Thus, the ratio of new supply to real GNP rose from 47.7 thousand tons per billion dollars in 1977 to 48.2 thousand tons in 1978 and 49.1 thousand tons in 1979. However, even in 1979 the ratio was 5% to 6% below the pre-1975 level. While the 1979 rise in the ratio may suggest that a small part of the new supply total was devoted to inventory accumulation, the gain was small and available data indicate that the level of inventories of paper, paperboard and products is reasonably aligned with consumption. At the mill levels and at box plant levels inventories are low relative to output rates and at the final consumer level they are generally reasonable with respect to current rates of use.

Continued on Page 12

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Earnings

The table below summarizes quarterly the reported revenue and profits data for 30 paper and allied products companies and 10 paper related companies. These earnings are calculated on the basis of continuing operations and do not include extraordinary gains or losses.

Sales of these companies in the first three quarters of 1979 accounted for about 63% of the sales total reported by the Federal Trade Commission for all paper and allied products companies. The 1978-1979 change in sales was close to that of the FTC data, but the FTC earnings showed stronger gains, probably because the FTC included certain gains omitted here. If fourth quarter sales and earnings of the total industry as reported by the FTC follow the pattern of these 30 companies, paper industry earnings after taxes in 1979 would amount to about $3.85 billion, up 48% over the year-ago level, while sales would total $55.5 billion, up 13%.

SALES AND EARNINGS AFTER TAXES

1979 - 1978

	1979 1/			1978			% Change 1979 / 1978	
		Earnings			Earnings			
	Sales	Total	% Sales	Sales	Total	% Sales	Sales	Earnings
	---$ Million---			---$ Million--			--------%--------	
				30 PAPER AND ALLIED PRODUCTS COMPANIES				
1st Qtr.	8,112	528.7	6.5	7,101	372.4	5.2	+14.2	+42.0
2nd Qtr.	8,817	646.4	7.3	7,885	512.6	6.5	+11.8	+26.1
3rd Qtr.	8,934	574.2	6.4	7,800	438.5	5.6	+14.5	+30.9
4th Qtr.	9,148	534.7	5.8	8,072	549.2	6.8	+13.3	- 2.7
Full Year	35,010	2,284.0	6.5	30,858	1,872.8	6.1	+13.5	+22.0
				10 PAPER RELATED COMPANIES				
Full Year	47,694	2,715	5.7	40,524	2,265	5.6	+17.7	+19.9

1/ Income from continuing operations before extraordinary charges and income.

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

FEBRUARY 26, 1980

PRODUCTION (000 TONS)

	Jan. 1980	Dec. 1979	Jan. 1979	Jan - Dec. 1979	Jan - Dec. 1978	% Change 79/78
PAPER GRADES	P	R				
Newsprint	376	339	315	4062	3768	7.8
Uncoated Groundwood (s)	119	118	114	1474	1309	12.7
Coated Paper (s)	397	366	363	4510	4448	1.4
Uncoated Free Sheet Paper (s)	681	635	622	7868	7225	8.9
Thin Paper (c)	31	29	31	377	354	6.6
Cotton Fiber Paper (s)	12	10	10	125	114	9.4
Bleached Bristols (c)	93	83	93	1107	1095	1.1
Tissue Paper	370	335	359	4523	4215	7.3
Unbleached Kraft Packaging & Indl. Converting (s)	308	305	317	3963	3884	2.0
Other Paper (c)	160	145	137	1785	1430	24.8 *
TOTAL PAPER	2546	2364	2362	29794	27842	7.0
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1212	1064	1132	14076	13228	6.4
Other Kraft Paperboard	105	58	104	1127	1145	-1.6
Semichemical Paperboard	424	358	375	4721	4439	6.4
Bleached Paperboard	346	295	320	4023	3979	1.1
Recycled Paperboard	652	572	648	7683	7485	2.7
TOTAL PAPERBOARD	2739	2346	2578	31631	30275	4.5
CONSTRUCTION & WET MACH GRADES(c)	255	248	282	3458	3515	-1.6
TOTAL PAPER AND PAPERBOARD	5540	4957	5222	64883	61632	5.3
HARD PRESSED BD.[not in total](c)	165	155	167	2141	2180	-1.8

WOOD PULP (ALL GRADES)	Dec. 1979	Nov. 1979	Dec. 1978	Jan - Dec. 1979	Jan - Dec. 1978	% Change 79/78
Dissolving & Special Alpha	118	130	98	1497	1411	6.1
Bleached Sulphite	121	121	87	1379	1420	-2.9
Unbleached Sulphite	30	33	32	396	330	19.9
Bleached & Semi-Bl. Sulph.	1398	1562	1283	18061	17114	5.5
Unbleached Sulphate	1544	1695	1466	19930	19028	4.7
Semichemical	310	344	296	4068	3783	7.5
Groundwood and Thermo-Mechanical	355	371	344	4385	4141	5.9
TOTAL PULP DIVISION DATA	3874	4255	3606	49715	47228	5.3
Defib. Exploded & Scrngs E	225	241	243	3130	3155	-0.8
TOTAL WOOD PULP PRODUCTION	4099	4496	3849	52845	50383	4.9

Note: Paperboard cumulative totals include revisions not available monthly.
* - Census indicates that 1978 Other Paper production will be revised upward.
(s) - Shipments R - Revised E - Estimate
P - Preliminary (c) - Census Data - Production, last 2 months estimated.

February 29, 1980

	Full Year		INDUSTRY DATA 1979 R	 1979 R	 1980 P	Ann. Rate Year - To - Date	% From Same Pd Last Yr
PAPER AND PAPERBOARD -- Tons (000)	1978	1979	November	December	January	1980	
Total Production (API).......¦ ¦...	61632	64883	5522	4957	5540	66476	6.1
Total Seasonally Adjusted....¦ excluding ¦...			5511	5541	5507	66081	6.0
Imports (including Products).¦hard pressed¦..E	9117	9125	787	766	773	9279	1.5
Exports (including Products).¦ board ¦..E	3373	3672	310	335	328	3941	27.6
Apparent Consumption.........¦ ¦...	67376	70336	5988	5973	5952	5952	4.2
Paper Production % Tonnage Capacity...........	91.4	95.7	95.9	86.5	92.5	93.8	-
Paperboard Production % Tonnage Capacity......	92.8	94.8	96.5	81.2	94.1	94.1	-
	1977	1978	October	November	December	1979	
MARKET WOOD PULP PRODUCTION - Tons (000).........	4819	5165	532	509	485	5723	10.8
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	46652	47228	4419	4255	3874	49715	5.3
WOOD PULP IMPORTS - TONS (000)..................	3864	4025	358	373	347	4324	7.4
WOOD PULP EXPORTS - TONS (000)..................	2640	2599	265	255	290	2935	12.9
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS	1977	1978	October	November	December	1979	
Wood Pulp..(k)................................	47596	48350	4462	4286	3935	50658	4.8
Waste Paper....(d)............................	14058	14760	1385	1397	1173	15400	4.3
Other (Census)...............................E	745	666	54	51	49	645	-3.2
Total.................	62399	63776	5900	5734	5157	66703	4.6
..WOOD PULP - NON PAPER.........................E	876	884	79	73	73	906	2.5
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	74807	77290	7103	6723	6057	79566	2.9
EMPLOYMENT (000)	1978	1979	November	December	January	1980	
Paper and Allied Products..........Total......	700.9	714.2	715.9	715.1	712.7	712.7	1.8
Pulp, Paper and Board Mills........Total.....E	267.0	271.2	271.9	273.4	272.0	272.0	4.0
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products.....................	6.52	7.12	7.42	7.49	7.52	7.52	10.6
Pulp, Paper Mills............................E	7.44	8.26	8.70	8.70	8.73	8.73	12.2
Paperboard Mills.............................E	7.68	8.39	8.81	8.87	8.90	8.90	10.7
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q2	1979 Q3	1979 Q4		
(Rept. by US Dept. of Com., Ann. Rates; Bill.$)#	3.36	3.46	4.80	4.68	5.09	4.84	40.0
INDEX OF OUTPUT PER MAN-HOUR (1967=100)..........	1977	1978	September	October	November	1979	
¦IN PULP, PAPER ¦...Production Workers........RS	148.1	153.9	158.7	162.1	162.8	158.6	3.5
¦AND BOARD MILLS¦...All Employees.............RS	144.0	148.4	152.9	156.3	156.8	152.8	3.3
PAPER AND ALLIED PRODUCTS (Million $)	1977	1978	October	November	December	1979	
Industry Shipments (Dept. of Commerce)#........	52368	57654	5641	5585	5583	66122	14.7
Pulp, Paper and Paperboard#.................	23701	25343	2598	2607	2719	30253	19.4
Inventories (End of Period) - Total Industry#.	5628	5875	6538	6615	6854	6854	16.7
Pulp, Paper and Paperboard#.................	2102	2006	2198	2258	2400	2400	19.6
	1977	1978	1979 Q1	1979 Q2	1979 Q3		
Sales (Corporations Only, FTC)................	45750	48982	12997	13828	14133	54611	13.3
Earnings (Corporations Only, FTC).............	2367	2598	867	917	1162	3928	58.0
Depreciation (Corporations Only, FTC).........	1663	1726	447	479	481	1876	9.8
Net Worth (Corporations Only, FTC)............	19704	20794	21282	21808	22688	22688	12.3
PRICE INDEXES (Bureau of Labor Stats)1967=100	1978	1979	November	December	January	1980	
Total Pulp, Paper and Allied Products.........	195.6	218.9	229.3	231.0	237.4	237.4	14.7
Wood Pulp.....................................	266.5	314.8	339.9	339.9	358.8	358.8	23.2
Waste Paper...................................	191.2	206.6	220.0	221.2	222.7	222.7	15.4
Paper...	206.1	229.7	242.1	243.0	245.5	245.5	12.7
Paperboard....................................	179.6	202.1	212.8	215.4	221.8	221.8	17.7
PAPER DEMAND (INDEXED: 1967=100)	1978	1979	November	December	January	1980	
Total Paper Production #......................	133.1	142.4	145.5	142.4	142.6	142.6	7.8
Paper New Supply #............................	131.2	137.8	141.3	137.6	138.3	138.3	6.1
Total End - Use Index #.....................	139.5	144.6	144.6	145.5	146.6	146.6	2.2
Production of Nondurable Goods #...(19%)..	157.0	163.3	164.4	164.7	165.5	165.5	3.0
Disposable Income (Constant $) #...(23%)..	145.2	148.5	148.7	148.7	149.3	149.3	0.4
Total Printing and Publishing #...(58%)..	131.5	136.9	136.5	137.9	139.3	139.3	2.7
Trend Factor	----------	----------	--------	--Not Available--	----------	----------	----------
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production #.................	132.8	138.8	141.7	145.8	144.0	144.0	6.2
Production for Domestic Use	227.3	203.5	138.5	145.7	139.8	139.8	3.8
Total End - Use Index #.....................	147.7	151.7	151.0	151.0	150.9	150.9	-0.3
Production of Consumer Goods #...(60.49%)	149.1	150.3	148.9	148.9	148.4	148.4	-1.5
Production of Equipment #...(6.62%)	132.8	142.1	143.7	144.9	146.1	146.1	4.4
Production of Materials #...(32.89%)	148.3	156.0	156.2	156.1	156.6	156.6	1.0
Trend Factor	----------	----------	--------	--Not Available--	----------	----------	----------
NEWSPRINT MARKETS	1977	1978	October	November	December	1979	
Consumption by Publishers - Tons (000)........	10228	10872	1019	1001	950	11218	3.2
Newspaper Pub. and Printing Emp. Total (000)..	395.6	407.4	424.4	428.4	429.7	420.7	3.3
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	106489	115090	12172	12940	10245	119817	4.1
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	15482	17586	1821	1699	1643	19725	12.2
Inventories (End of Period)	1261	1482	1597	1657	1684	1684	13.6
Paper Only..............................Sales	11799	13078	1368	1269	1208	14881	13.8
Inventories (End of Period)	873	1025	1082	1090	1119	1119	9.2
RETAIL TRADE (Million $)	1978	1979	November	December	January	1980	
Total Retail Sales #..........................	798818	882045	76427	76809	78545	942540	10.9
Nondurable Goods Stores Sales #..............	520902	578846	51137	51127	51942	623304	13.9
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)#.	146.1	151.3	152.1	152.3	152.7	152.7	0.8
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	209.3	235.4	246.9	249.4	254.7	254.7	15.4
	1977	1978	October	November	December	1979	
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	181.5	195.4	225.4	227.5	229.9	217.4	11.3
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	230.8	275.6	305.2	307.6	311.3	311.3	13.0
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1979 Q2	1979 Q3	1979 Q4		
G.N.P. or Expenditure - Current $.............	1899.5	2127.6	2329.8	2396.5	2459.4	2369.5	11.4
G.N.P. OR Expenditure - 1972 $................	1340.5	1399.2	1422.3	1433.3	1440.7	1431.7	2.3

lb/capita	Popul.(mil)
.a - 617	218.5
.b - 638	220.4
.c - 644	221.7

.d - 1977 - 12192; 1978 - 13185
. 1979 A.R. Jan-Oct - 13108
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1977 - 3,218; 1978 - 3,155; 1979 A.R.Y-T-D 3,130 (000 tons)
g - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '77 - 1,688; '78 - 1,655 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
w - Full year estimated by U.S. Dept. of Commerce
- Seasonally adjusted

A2500-2

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MONTHLY STATISTICAL SUMMARY

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January-February 1980 Production Continues High

Total production of paper and paperboard in the first two months of 1980 was at a seasonally adjusted rate of 66.4 million tons per year. This compares to the revised total of 64.9 million tons produced in 1979, and 62.1 million tons in 1978. Weekly data for the first two weeks of March indicated that production continued near this high rate and the rate of production for the entire first quarter of 1980 will probably be over 66 million tons per year.

Comparison of production rates in the first two months of 1980 with year-ago levels would show an even better performance but it would not be descriptive of the current trend of the industry. In the first two months of 1979 production of paper and paperboard was at a seasonally adjusted rate of about 5,250,000 tons per month; during the last ten months of the year, it averaged 5,450,000 tons per month. Thus, a somewhat better indicator of the performance is a comparison of the rates of production with the average rate for all of 1979.

Most of the gain in production was concentrated in the paper grades. Total paper production in the first two months of 1980 was at an annual rate of 30.7 million tons, compared to the 29.8 million tons produced in 1979, and 28.3 million tons in 1978. Within the paper structure, the major areas

Continued on Page 2

Continued from Page 1

of growth continued in the printing and writing papers. Production of total printing/writing papers in the first two months was at a rate of 16.1 million tons per year, compared to 15.5 million tons produced in 1979. Furthermore, total new orders for the printing paper grades for which we have such data - groundwood, coated and uncoated free sheet papers - in the first 2 months of 1980 were about 4% above the shipments total.

Among the paperboard grades, the major strength continued in containerboard. Production of containerboard for domestic use in the first two months of 1980 held close to its 1979 average level. In that same period, total shipments of fiber boxes were about 1-½% ahead of their 1979 average. Inventories of containerboard at fiber box plants and mills as of the end of February 1980 were at a very low five weeks of supply, and 100,000 tons below the total held at the beginning of the year.

Production of the boxboard grades, bleached board and recycled, were fairly close to their average 1979 levels in January and February 1980.

The paper and allied products industry currently appears to be following a somewhat stronger growth trend than the total economy. The Federal Reserve Board's index of production of paper and paper products was reported at an average level of 154.3 (1967 = 100) in the first two months of the year, 2% above its 1979 average of 150.8. The total index of production, at a shade below 153, is only about ½% above its 1979 average. Preliminary data indicate that total economic activity as measured by real GNP in the first quarter of 1980 was probably less than 1% above its 1979 average level.

Technical Note: The Bureau of Census recently published revised data on total production of paper and paperboard by major grade for 1978, with revised data for 1977. The preliminary 1978 data, based upon summing the reported monthly totals, amounted to about 60 million tons; the revised total was 62 million tons, which is in line with API's 1978 reported total. On the basis of its new survey, Census increased its reported production totals for bleached kraft, semichemical and recycled paperboard from the relatively low levels reported initially, to rates that were about in line with those reported by API. Revisions in the 1977 data also brought their totals in line with those originally published by API.

Census also made some major revisions in its data on production of packaging and industrial converting papers other than unbleached kraft. Census found previously unreported tonnages in the new specialty

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

	YEAR		NOV.	DEC.	JAN.	FEB.	Annual Rate Y-T-D	% Change from same Period Last Year
	1978	1979	1979	1979	1980	1980	1980	
PAPER					R	P		
Newsprint - Production	3768	4062	364	339	376	368	4459	19.2
- Shipments	3779	4066	361	347	369	368	4420	18.5
Printing & Writing	14541	15458	1303	1237	1406	1274	16077	10.7
Groundwood Paper - Shipments	1309	1474	128	118	125	114	1431	6.5
- New Orders	1367	1472	105	107	156	116	1631	13.7
- Unfilled Orders	179	181	183	181	192	204	204	7.0
Coated Paper - Shipments	4448	4510	381	366	435	377	4868	13.3
- New Orders	4428	4519	401	364	481	393	5246	19.2
- Unfilled Orders	404	436	427	436	443	469	469	12.5
Unctd Free Sheet - Shipments	7225	7868	667	635	723	664	8326	14.2
- New Orders	7542	7805	639	602	737	631	8206	9.4
- Unfilled Orders	754	688	710	688	663	684	684	-11.5
Thin Paper - Production *	350	376	31	28	31	29	360	-1.0
Cotton Fiber Paper - Shipments	114	125	11	10	12	11	137	13.9
Bleached Bristols -Production*	1095	1104	86	80	80	79	954	-13.4
Tissue Paper - Production	4215	4525	372	337	382	360	4453	4.9
Total Packaging & Other Paper	5789	5729	490	439	501	480	5887	8.4
Unbl. Kraft Paper - Shipments	3884	3963	333	305	346	325	4027	5.5
Other Paper - Production * #	1905	1767	157	134	155	155	1860	15.4
TOTAL PAPER-Production-Unadj.	28313	29774	2529	2351	2665	2481	30875	10.5
-Production-S.A.			2531	2473	2605	2511	30697	8.5
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	22790	23947	2047	1774	2098	1966	24321	7.4
Unbl. Kraft Linerboard - Total	13228	14076	1209	1064	1213	1162	14250	7.3
Production for Export	1466	1621	160	120	177	147	1940	39.9
Other Unbl. Kraft Paperboard	1144	1127	101	58	104	87	1146	-0.0
Semichemical Paperboard	4439	4721	395	358	423	395	4908	13.4
Production for Export	119	92	7	4	11	12	133	75.2
Solid Bleached Paperboard	3979	4023	343	295	347	323	4017	3.3
Production for Export	430	466	40	32	43	47	535	30.0
Recycled Paperboard	7485	7683	657	572	649	621	7621	1.2
Production for Export	22	22	2	3	2	2	27	29.9
TOTAL PAPERBOARD-Prod.-Unadj.	30275	31631	2714	2346	2737	2587	31943	5.9
- Containerboard Prod.(Dom. Use)	17908	19031	1614	1460	1611	1550	18962	5.8
- Boxboard Production (Dom. Use)###	6505	5897	488	428	506	470	5857	-0.1
- All Other P'bd Prod.(Dom. Use)###	3825	4503	403	299	388	360	4488	0.7
- Total Paperbd Prod. for Export	2037	2200	210	159	232	207	2635	39.1
TOTAL PAPERBOARD PROD. - S.A.			2695	2773	2737	2639	32259	4.0
WET MACHINE BOARD *	136	144	14	16	15	15	180	49.3
BUILDING PAPERS *	1915	1909	154	147	150	155	1830	0.7
INSULATING BOARD *	1416	1424	111	95	100	100	1200	-12.5
TOTAL ALL GRADES - Unadjusted	62055	64881	5522	4954	5667	5338	66028	7.5
- Production - S.A.			5512	5538	5632	5439	65427	5.5
HARD PRESSED BD. [not in total]*	2294	2123	165	137	150	155	1830	-5.0

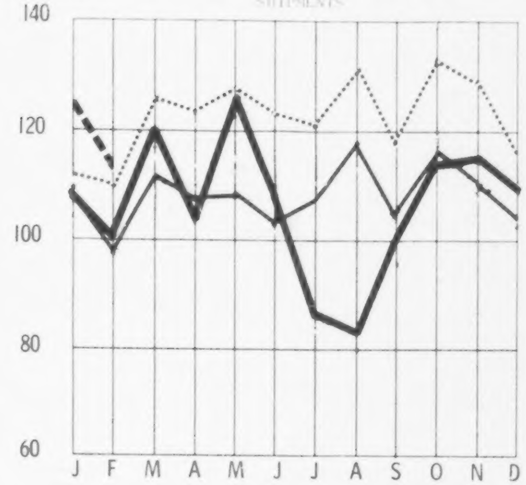
* Census Data - Production. Last two months estimated.
# Production excludes API bleached kraft envelope.
## Includes revisions not available monthly.
### Data on unbleached kraft folding boxboard for 1979 and 1980 included in All Other.

S.A. Seasonally Adjusted
P Preliminary
R Revised

THOUSANDS OF TONS

GROUNDWOOD PAPER, UNCOATED

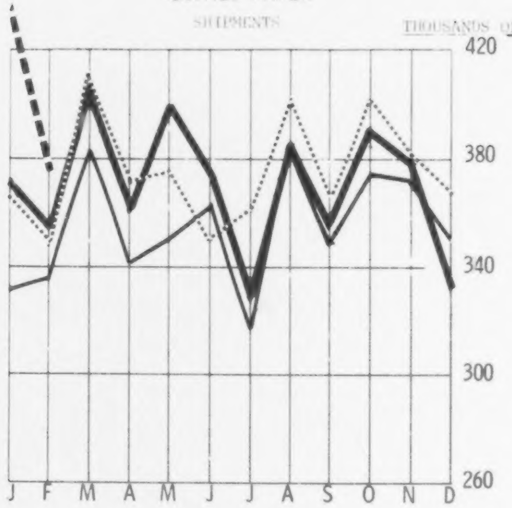
SHIPMENTS



COATED PAPER

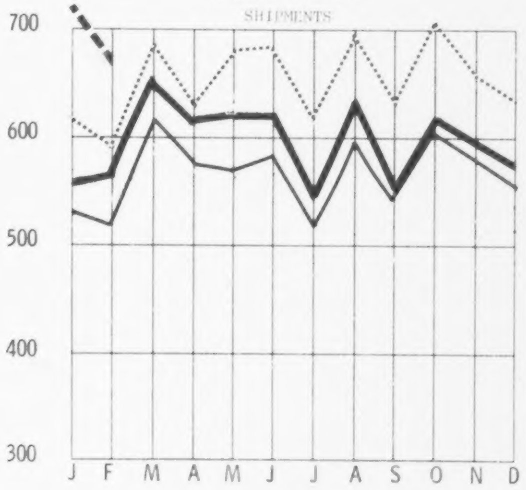
SHIPMENTS

THOUSANDS OF TONS



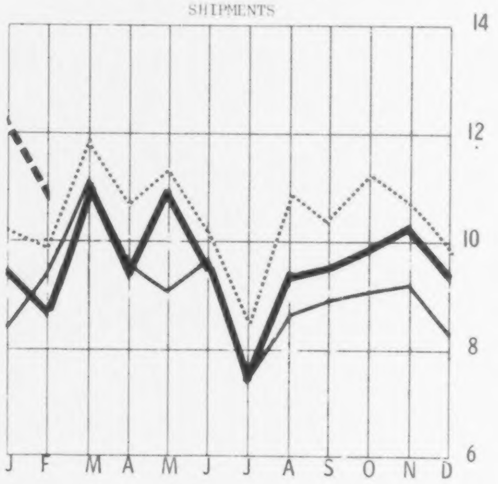
UNCOATED FREE SHEET PAPERS

SHIPMENTS



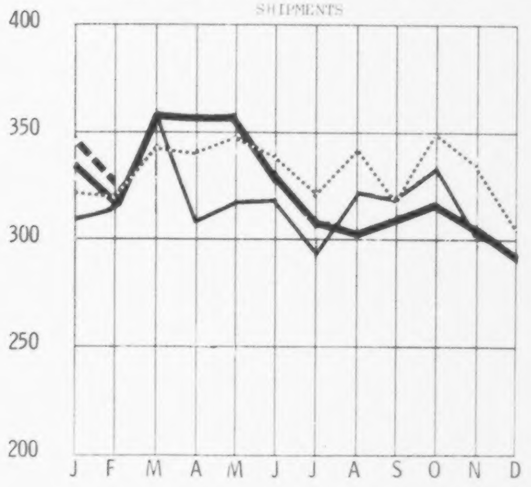
COTTON FIBER PAPER

SHIPMENTS



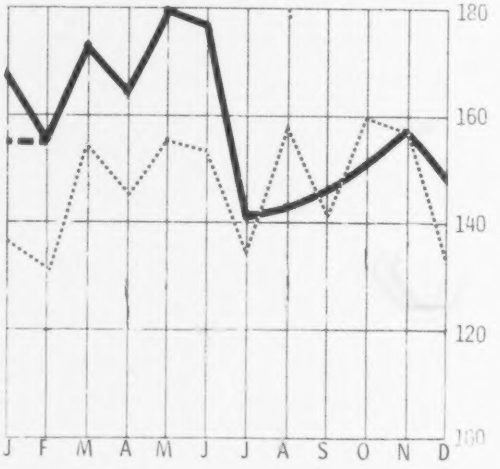
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1977 ━━ 1978 ▬▬ 1979 ········ 1980 ━ ━ ━

WOOD PULP STATISTICS
(Thousands of Tons)

	YEAR 1978	YEAR 1979	OCT. 1979	NOV. 1979	DEC. 1979	JAN. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
TOTAL WOOD PULP (1)					R	P		
Total Wood Pulp - Production	47228	49717	4419	4255	3874	4390	52676	12.0
- Imports	4025	4324	358	373	347	365	4381	10.3
- Exports	2599	2935	265	255	290	212	2549	29.0
- New Supply	48653	51106	4512	4373	3931	4542	54508	11.2
Dissolving Pulp - Production	1411	1497	148	130	118	146	1746	48.2
- Imports	189	193	9	20	22	25	303	41.2
- Exports	758	764	64	67	75	43	517	5.4
- New Supply	842	926	93	83	64	128	1533	69.7
Paper Grades Chemical Pulp - Production	37893	39768	3527	3410	3092	3528	42330	11.8
- Imports	3627	3930	333	340	311	325	3902	7.7
- Exports	1780	2100	193	180	209	160	1914	32.3
- New Supply	39740	41597	3667	3570	3194	3693	44318	10.7
Groundwood and Thermo-Mech. - Production	4141	4385	382	371	355	364	4368	4.5
- Imports	208	201	16	13	14	15	176	29.1
- Exports	62	70	8	8	6	10	118	201.9
- New Supply	4287	4516	389	376	364	369	4426	3.5
Semi-Chemical - Production	3783	4068	363	344	310	353	4232	10.3
- Imports	0	0						
- Exports	0	0	------	Included	with	Groundwood	Pulp	------
- New Supply	3783	4068	363	344	310	353	4232	10.3
MARKET WOOD PULP								
Total Market Wood Pulp - Production	5165	5723	532	509	485	562	6740	51.8
- Imports	2816	3046	251	265	233	276	3317	14.3
- Exports	2480	2784	231	249	262	219	2632	44.4
- New Supply	5501	5985	552	525	456	619	7426	34.5
Dissolving Pulp - Production	1406	1497	147	130	117	145	1744	43.4
- Imports	291	306	13	25	16	17	202	-40.6
- Exports	824	869	63	77	86	56	671	29.4
- New Supply	873	934	97	78	48	106	1274	22.9
Paper Grades Chemical Pulp - Production	3675	4163	378	372	362	410	4921	52.6
- Imports	2495	2734	237	240	217	259	3108	21.7
- Exports	1613	1870	164	168	173	156	1867	46.1
- New Supply	4557	5027	452	444	405	514	6162	36.9
Groundwood Pulp and All Other - Production	83	63	6	7	6	6	76	0.0
- Imports	26	7	2	0	0	1	6	-16.7
- Exports	42	46	4	4	4	8	94	254.5
- New Supply	67	24	3	3	2	0	- 0	0.0

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1978 - 3,140; 1979 - 3,018; A.R.Y-T-D'80 - 2,568
SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

FIBROUS RAW MATERIALS
(Thousands of tons)

	YEAR 1978	YEAR 1979	OCT. 1979	NOV. 1979	DEC. 1979	JAN. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	63485 R	66176 R	5856	5689	5186	5697	68359	6.4
Total Wood Pulp (2) A	47947 R	50133 R	4417	4241	3881	4353	52235	7.2
Market Wood Pulp A	4774	5030	441	411	399	440	5280	-0.1
Waste Paper (3) A	14760	15400	1385	1397	1258	1289	15464	4.4
Rags, Straw & Other C, E	778 R	643	54	51	47	55	660	-3.5
INVENTORIES								
Wood Pulp at Pulp Mills A	130	107	112	117	107	104	104	-24.3
Market Pulp at Pulp Mills A	187	132	152	158	132	160	160	-8.9
Mkt. Pulp at Ppr.& Bd. Mills CE	435	421	390	404	421	410	410	9.9
Waste Ppr.at Ppr.&Bd. Mills (4)	740	798 R	800	795	798	881	881	5.0
Rags, Straw and Other at Paper and Board Mills C, E	66	61	61	62	61	60	60	0.0
Mkt. Wood Pulp Days of Supply A	44	38	46	38	38	38	38	4.0
Wood Pulp Consumption at at Non-Paper Mills C, E	884	909	79	74	75	75	900	-4.3

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.(000 tons): 1978 - 1,666; 1979 - 1,593
(3) Census Waste Paper Consumption, (000 tons): 1977 - 12,103; 1978 - 12,481; 1979 - 12,962
(4) Census data prior to 1979; more recent data are from the Paper Stock Conservation Committee, A.P.I.

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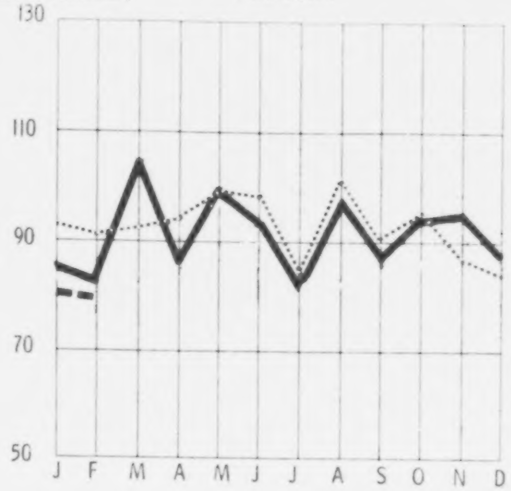
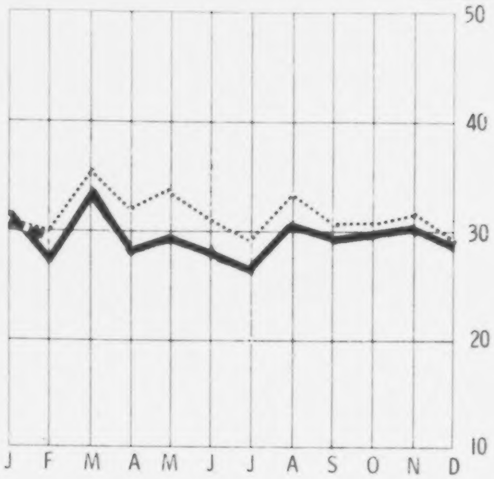
THOUSANDS OF TONS



BLEACHED BRISTOLS

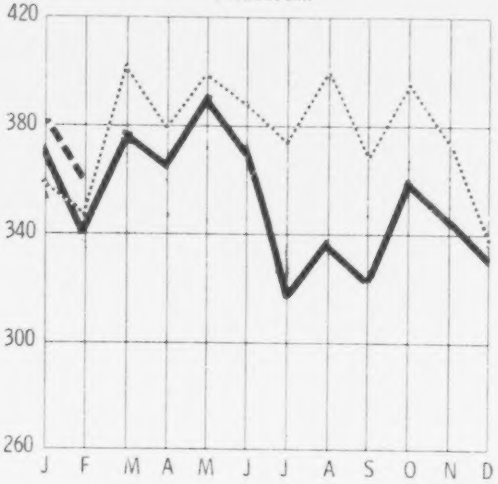
PRODUCTION

THOUSANDS OF TONS



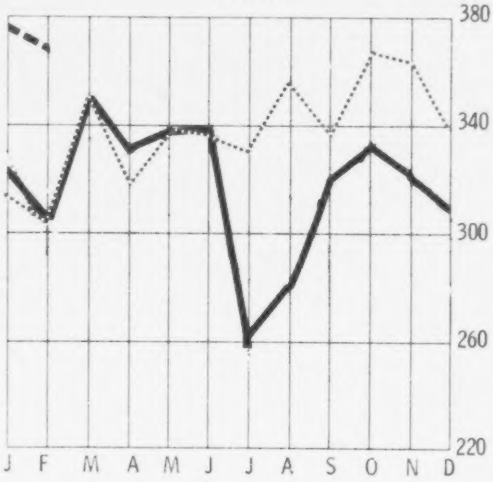
THIN PAPERS

PRODUCTION



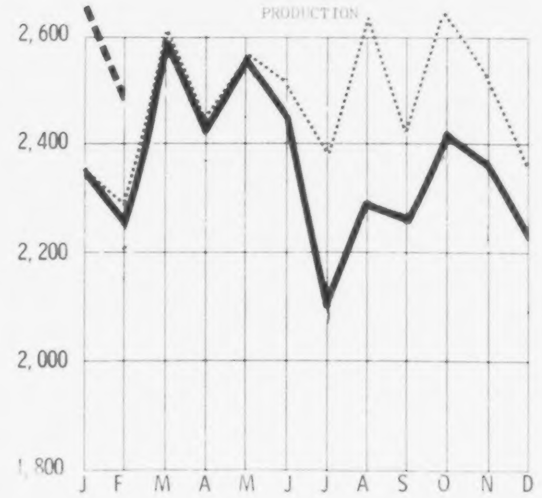
TISSUE PAPER

PRODUCTION



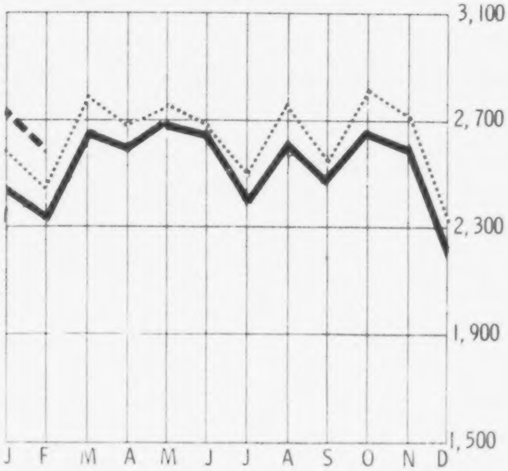
NEWSPRINT

PRODUCTION



TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION

1977 ——— 1978 ▬▬▬ 1979 ········ 1980 ▬ ▬ ▬

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR		OCT.	NOV.	DEC.	JAN.	Annual Rate Y-T-D	% Change from same Period Last Year
		1978	1979	1979	1979	1979	1980	1980	
PULPWOOD									
Total U.S.	- Total Receipts	77025	78625	7505	6557	6479	6906	82872	16.1
	- Total Consumpt.	77290	79566	7103	6723	6057	6923	83076	8.1
	- Residues *	30369	30015	2915	2317	2150	2415	28980	5.7
	- Inventories	6244	5506	5320	5110	5506	5320	5320	-8.6
So. Atlantic	- Total Receipts	25353	26126	2393	2202	2103	2248	26976	4.5
	- Total Consumpt	25204	26523	2385	2240	1934	2320	27840	5.4
	- Residues *	8513	8858	807	718	673	730	8760	-2.4
	- Inventories	1191	1052	911	880	1052	997	997	-14.3
Northeast	- Total Receipts	6664	7461	649	662	618	735	8820	21.5
	- Total Consumpt	6607	7584	661	681	595	680	8160	4.6
	- Residues *	1662	1670	143	147	113	119	1428	-12.5
	- Inventories	770	674	680	654	674	667	667	-13.2
South Central	- Total Receipts	25572	26654	2568	2178	2225	2281	27372	14.0
	- Total Consumpt	25678	26432	2308	2154	1999	2275	27300	2.4
	- Residues *	8418	8669	787	655	616	737	8844	1.9
	- Inventories	1194	1472	1243	1281	1472	1485	1485	44.6
North Central	- Total Receipts	5291	5630	518	452	569	612	7344	42.0
	- Total Consumpt	5330	5535	448	474	430	459	5508	-3.0
	- Residues *	1456	1501	142	138	117	129	1548	20.6
	- Inventories	968	993	885	857	993	1119	1119	19.2
West	- Total Receipts	14145	12754	1377	1063	964	1030	12360	35.5
	- Total Consumpt	14471	13492	1301	1174	1099	1189	14268	38.7
	- Residues *	10320	9317	1036	659	631	700	8400	22.6
	- Inventories	2121	1315	1601	1438	1315	1052	1052	-45.3

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1979		DEC. 1979		JAN. 1980		Annual Rate Y-T-D 1980	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000		
Pulpwood, Roundwood (in cords of 128 cubic feet)	206050	8867	16019	678	27971	1142	335652	194.2
Pulpwood Chips	1527734	30440	105429	2352	121955	2847	1463460	40.9
Wood Pulp, Total	4143944	1404354	340030	125530	338458	130286	4061496	5.2
Waste Fibrous Materials, Total	88344	13727	3083	427	4737	662	56844	-39.0
Paper,Paperboard&Products,Total	8501965	2779223	723425	252471	729169	253302	8750023	1.5
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8457803	2725085	719940	247556	725411	249553	8704928	1.4
Paper, Total	8015574	2642945	684269	239975	679356	241449	8152268	-0.0
Newsprint	7077209	2249470	622835	211151	610793	209615	7329516	-0.8
Printing,Writing & Rel.Pap.	799355	322818	49358	22122	60840	27667	730084	13.0
Pack. & Ind. Conv. Paper	118815	57854	10746	5827	7141	3832	85697	-19.7
Special Industrial Paper	3157	3324	188	260	30	40	360	-56.1
Tissue Paper	17039	9479	1142	614	551	295	6612	-52.2
Paperboard, Total	80636	17653	9705	2537	8789	2085	105464	10.1
Wet Machine Board	1522	703	184	91	81	39	973	-27.3
Construction Paper and Bd. *	360071	63784	25781	4952	37185	5981	446222	34.9
Convtd Paper&Paperbd Products	44163	54138	3486	4915	3758	3750	45095	26.0

EXPORTS TO CANADA

	YEAR 1979 Tons	YEAR 1979 $000	DEC. 1979 Tons	DEC. 1979 $000	JAN. 1980 Tons	JAN. 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	263367	11446	12201	630	11477	489	137724	-76.6
Pulpwood Chips	87790	3790	1021	32	1662	46	19944	-78.8
Wood Pulp, Total	136641	49608	8834	3476	9068	4157	108816	-25.8
Cotton Pulp & Other Pulp	7921	3728	586	217	883	473	10596	164.4
Waste Paper	478477	50207	44313	3812	37623	3866	451476	24.1
Paper,Paperboard&Products,Total	624928	353202	44540	24684	49153	28900	589840	-1.5
Paper, Paperboard, Wet Machine Bd & Constr. Paper & Board *	454029	248403	34505	17256	37550	20726	450601	1.8
Paper, Total	181451	142407	14812	10238	17503	12761	210038	13.4
Newsprint	2803	1734	110	94	113	126	1361	-81.6
Printing,Writing & Rel.Pap.	108290	76567	8580	5629	9718	7245	116610	11.2
Pack. & Ind. Conv. Paper	16084	10108	1060	761	1144	617	13730	-18.6
Special Industrial Paper	46773	48173	4795	3482	6354	4571	76253	54.1
Tissue	7502	5825	267	272	174	202	2084	-68.6
Paperboard, Total	230904	83021	17056	5880	17828	6971	213938	-2.1
Wet Machine Board	5262	9916	351	195	276	148	3311	-33.0
Construction Pap. & Bd. E *	36411	13059	2287	944	1943	846	23314	-31.4
Convtd Paper&Paperbd Products	170900	104799	10035	7428	11603	8175	139238	-10.9
* - Hard Pressed Board (not in total)								
Imports of Hard Pressed Bd.	29771	5370	2521	449	1851	319	22212	149.8
Exports of Hard Pressed Bd.	20535	6878	1028	378	1764	642	21168	-25.4

SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

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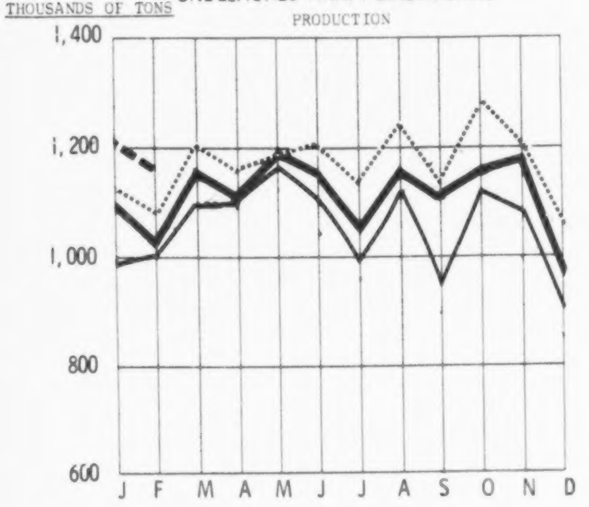
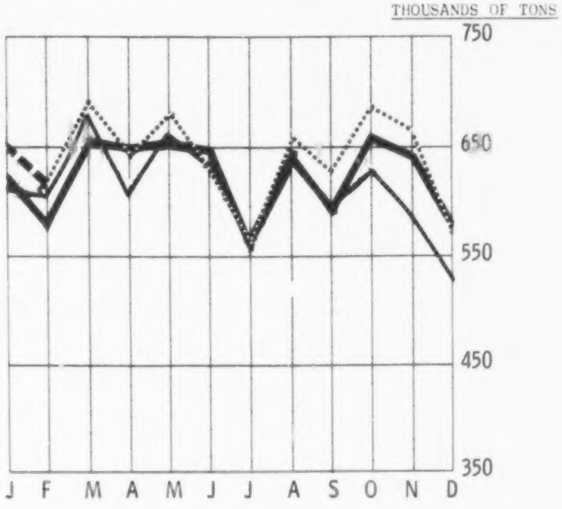
UNBLEACHED KRAFT LINERBOARD

PRODUCTION

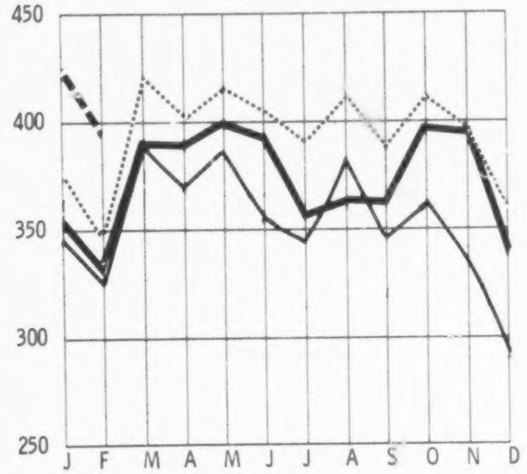


RECYCLED PAPERBOARD



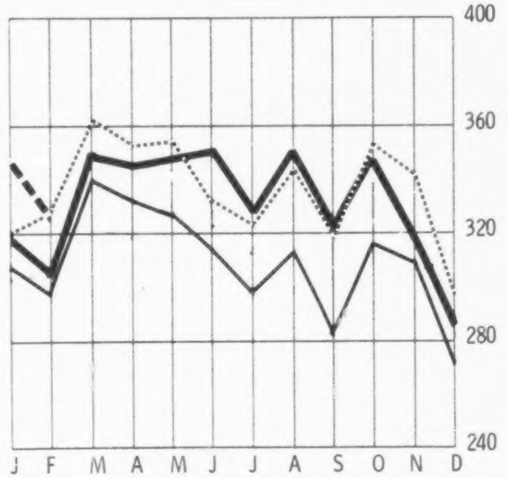
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



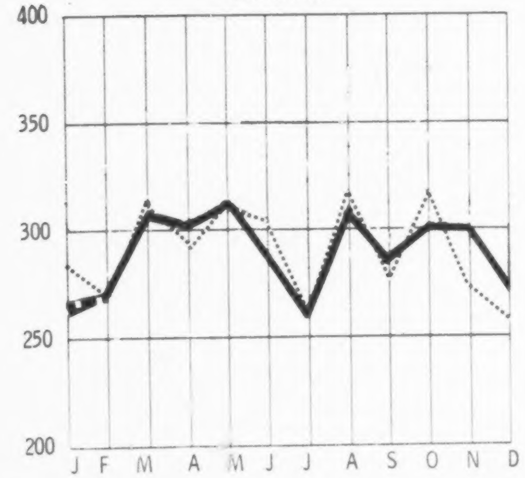
SOLID BLEACHED PAPERBOARD

PRODUCTION



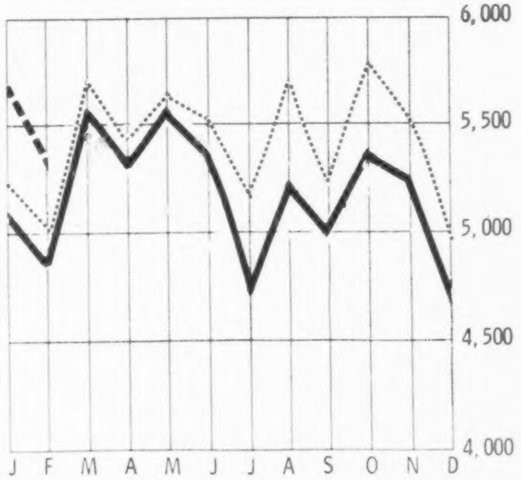
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1977 ——— 1978 ▬▬▬ 1979 ········· 1980 ▬ ▬ ▬

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1979		DEC. 1979		JAN. 1980		(1) Annual Rate Y-T-D	% Change from same Period
	Tons	$000	Tons	$000	Tons	$000	1980	Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206074	8869	16019	678	27971	1142	335652	194.2
Pulpwood Chips	1574763	33413	105429	2352	121955	2847	1463460	85.7
Total All Imports	13554749	4693607	1117020	414524	1140960	437662	13691522	3.5
Wood Pulp, Total	4324033	1465169	347070	127965	365057	139708	4380684	10.3
Waste Paper	62310	8625	1985	176	2491	246	29892	-55.7
Other Fibrous Materials	43640	13149	1877	874	2578	616	30936	-40.8
Paper, Paperbd&Products, Total	9124767	3206665	766089	285508	770834	297092	9250010	1.2
Paper, Paperboard, Wet Machine Bd. & Construction Paper & Board	9028643	2983554	758851	266523	762596	267544	9151151	1.0
Paper, Total	8561213	2894764	720535	258443	714401	258955	8572812	-0.5
Newsprint	7224195	2300450	635659	216690	619158	212650	7429896	-0.7
Printing & Writing	1176253	510579	72085	34303	86535	41043	1038416	4.8
Uncoated Groundwood	804598	295996	47041	18925	60603	24944	727230	14.5
Uncoated Book	142674	69291	8924	4740	10206	5728	122471	16.4
Coated Print.& Impres. Pap	188846	108590	12403	7560	12917	7706	154998	-30.5
Bristols	2247	1243	88	66	40	31	474	-38.4
Writing and Similar Paper	22964	23403	2040	1812	2030	1726	24354	46.7
Thin (except Cigarette)	14924	12057	1588	1199	741	909	8890	-14.2
Total Pkg & Other Paper	143452	74013	11649	6836	8156	4965	97870	-25.8
Unbleached Kraft Paper	66816	23211	4321	1718	3009	1203	36103	-41.7
Other Pkg. & Indust. Paper	76636	50802	7328	5118	5147	3762	61766	-11.7
Tissue	17312	9722	1142	615	553	297	6630	-54.6
Paperboard, Total	82203	19111	9772	2604	8858	2182	106292	8.9
Test or Containerboard	25725	6021	5406	1437	4950	1295	59402	83.7
Semi-Chemical Corrugating	33494	5889	1656	313	2954	542	35446	-22.2
Other Paperboard	22984	7201	2619	854	954	344	11444	-41.9
Wet Machine Board	2345	1341	232	142	165	106	1978	-25.1
Construction Paper & Bd. *	382883	68338	28314	5334	39172	6301	470069	35.9
Building Paper	330147	56768	24049	4326	35066	5384	420791	37.8
Insulating Board	21682	4664	1132	263	1495	318	17938	-4.7
Other Building Board	31054	6906	3133	746	2612	599	31340	44.9
Convtd Paper&Paperbd Products	96124	223111	7237	18985	8238	29548	98860	31.3
Paper Products, Total	90317	211663	6784	17987	7787	28646	93444	32.0
Paperboard Products, Total	5807	11447	453	998	451	902	5416	19.6
Notes								
Other: No Weight Avail. ($000)		81899		6245		5807	69679	-10.2
Total Imports Incl. Other($000)		4775506		420769		443469	5321623	29.2

EXPORTS

	YEAR 1979		DEC. 1979		JAN. 1980		(1)	% Change
Pulpwood, Roundwood (in cords of 128 cu. ft.)	263721	11473	12201	630	15183	545	182196	-69.1
Pulpwood Chips	4498674	197847	396600	17567	308487	18013	3701844	13.6
Total All Exports	8971542	3348192	868700	335516	807407	304557	9688888	39.7
Wood Pulp, Total	2934818	1103556	289972	119547	212395	84743	2548740	29.0
Cotton Pulp and Other Pulp	131444	74579	13088	7944	14896	8494	178752	116.6
Waste and Old Paper	2233246	256108	230958	26434	225011	25444	2700132	50.9
Paper, Paperbd&Products, Total	3672034	1913949	334682	181591	355105	185876	4261264	38.0
Paper, Paperboard, Wet Machine Bd. & Construction Paper & Board	3109390	1328329	285555	127955	306865	131185	3682382	46.9
Paper, Total	575936	486248	60022	47762	64489	47518	773866	44.3
Newsprint	71456	32046	9436	4706	12414	4945	148964	59.6
Printing & Writing	274609	233380	24680	20933	23177	21660	278120	6.6
Uncoated Groundwood	80392	55384	6758	4871	5960	4199	71516	-12.3
Clay Coated Paper	73521	57743	6225	4825	6657	5749	79889	30.7
Uncoated Free Sheet	68159	64146	7163	6789	6206	7118	74473	16.1
Other Printing & Writing	52537	56107	4534	4448	4354	4594	52242	-3.4
Total Pkg. & Other Paper	201966	196888	23320	19710	27309	19470	327706	111.9
Unbleached Kraft	63695	27079	11086	4424	12814	4090	153766	558.0
Other Pkg. & Indust. Paper	138271	169809	12234	15287	14495	15380	173940	32.5
Tissue	27905	23934	2586	2413	1590	1443	19075	-30.3
Paperboard, Total	2471843	811232	220971	77758	237758	81382	2853092	49.4
Solid Wood Pulp	2296032	733605	208694	72110	225207	75789	2702486	56.6
Total Linerboard	1644901	434515	153729	45491	165160	47767	1981918	56.5
Bleached Kraft Linerboard	179995	51186	19852	5930	15471	4820	185650	41.1
Unbleached Kraft Linerbd	1464906	383330	133877	39560	149689	42948	1796268	58.3
Other Unbleached Kraft	100301	33739	9394	3407	9037	2932	108449	6.7
Other Bleached Kraft	533472	260142	44884	22876	50093	24786	601110	71.1
Semi-Chemical Corrugating	17358	5208	687	336	918	304	11010	63.1
Recycled Paperboard	175811	77626	12277	5648	12551	5594	150606	-17.9
Wet Machine Board	7371	5146	535	413	506	321	6067	-32.8
Construction Paper & Bd. *	54241	25704	4027	2024	4113	1963	49357	-4.0
Building Paper	33619	14420	2718	1299	2617	1089	31400	-10.1
Insulating Board E	20623	11284	1309	725	1496	874	17957	8.9
Convtd Paper&Paperbd Products	562643	585620	49127	53636	48240	54691	578881	-0.5
Paper Products, Total	332407	427080	26554	37736	28929	38724	347150	20.8
Paperboard Products, Total	230237	158540	22573	15899	19311	15967	231731	-21.3
Notes								
Other: No Weight Avail. ($000)		9803		927		1131	13566	78.9
Total Exports Incl. Other($000)		3357995		336443		305687	3668243	48.2

* Hard Pressed Board (not in total)

Imports of Hard Pressed Board	260775	39528	21540	2946	16887	2559	202644	-15.7
Exports of Hard Pressed Board	32030	11223	1700	703	2425	862	29100	-16.8

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1977	YEAR 1978	SEPT 1979	OCT. 1979	NOV. 1979	DEC. 1979	Annual Rate Y-T-D 1979	% Change from same Period Last Year
PAPER	R	R			R	P		
Newsprint	3525	3489	299	365	351	324	3798	8.8
Uncoated Groundwood Papers	1589	1569	133	154	142	133	1673	6.6
Coated Papers	4215	4513	373	415	400	382	4669	3.4
Uncoated Free Sheet (1)	7036	7315	602	680	646	605	7499	2.5
Cotton Fiber Paper (1)	111	119	10	11	11	10	127	6.3
Thin Papers	339	350	31	31	31	28	376	7.5
Bleached Bristols	1108	1127	92	95	86	80	1104	-2.0
Tissue Paper	4243	4245	343	392	355	331	4313	1.6
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	4061	3873	327	359	355	308	3927	1.4
Other Paper (1)	1869	1905	141	160	157	134	1767	-7.3
TOTAL PAPER GRADES	28096	28505	2352	2661	2534	2334	29251	2.6
PAPERBOARD								
Solid Wood Pulp Furnish	21580	22500	1816	2030	1982	1738	22812	1.4
Unbleached Kraft Linerboard	12660	13215	1076	1226	1160	1010	13656	3.3
Other Unbl. Kraft Paperboard	837	898	76	80	90	69	1022	13.7
Bleached Kraft Paperboard	3883	4002	327	358	356	317	3946	-1.4
Semi-Chemical Paperboard	4199	4384	337	366	376	342	4189	-4.5
Recycled Paperboard	7426	7534	592	668	624	565	7211	-4.3
TOTAL PAPERBOARD GRADES	29006	30034	2408	2698	2606	2303	30024	-0.0
WET MACHINE BOARD	129	136	13	15	14	16	144	5.6
CONSTR. PAPER & INSUL. BOARD	3255	3332	264	299	265	241	3333	0.0
TOTAL ALL GRADES [Excl. H.P.B.]*	60486	62006	5037	5674	5419	4894	62752	1.2

PRODUCER PRICE INDEXES

1967 = 100

	1978	1979	NOV.	DEC.	JAN.	FEB.		
Pulp, Paper and Products	195.6	218.9	229.3	231.0	237.4	238.9	238.2	14.6
Pulp, Paper & Products, except Waste Paper #	195.6	219.1	229.5	231.2	237.6	239.2	238.4	14.7
Total Wood Pulp	266.5	314.7R	339.9	339.9	358.8	358.5	358.7	23.1
Total Paper	206.1	229.6R	242.1	243.0	245.5	247.5	246.5	12.3
Total Paper, exc. Newsprint	199.4	222.9	234.5	234.7	238.0	240.3	239.2	12.0
Newsprint	226.3	249.9	265.1	268.2	268.2	269.4	268.8	13.1
Total Paperboard	179.6	202.1	212.8	215.4	221.8	223.4	222.6	17.6
Total Paper and Paperboard #	197.8	220.9R	232.9	234.3	238.1	239.9	239.0	13.9
Converted Products	186.5	209.7	218.4	220.3	227.5	228.7	228.1	14.6
Waste Paper	191.2	206.6	220.0	221.2	222.7	223.2	223.0	15.2
All Commodities	209.3	235.5R	246.9	249.4	254.7	259.8	257.3	15.7
Industrial Commodities	209.4	236.3	250.2	252.8	260.3	265.4	262.9	18.9

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. # Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

packaging grades. As a result of this, the total production of packaging and industrial converting papers, excluding unbleached kraft plus special industrial papers, which had previously been reported at 1,385,000 tons for 1978, was revised upward to 1,905,000 tons. API uses Census figures for these two grades in its own reported data on total paper production. These revisions have now been incorporated in the API figures for total paper. In earlier reports, we had noted that these 1978 figures were apparently too low, and Census has now corrected that as well as the 1977 figures. However, it now appears that the 1979 reported totals for these grades are themselves too low and will probably be adjusted upward when Census re-surveys companies on their 1979 output.

The following table shows the new Census totals for 1977, 1978 and the preliminary totals for 1979 for the four major sectors of paper and paperboard, together with the revised totals reported by API for these same years.

PAPER AND PAPERBOARD PRODUCTION

(000 Tons)

	1977	1978	1979	1977	1978	1979
Paper	28,096	28,506	29,251	27,682	28,313	29,774
Paperboard	29,006	30,035	30,024	28,953	30,275	31,631
Construction Paper, Wet Machine and Insulating Bd.	3,384	3,468	3,476	3,384	3,468	3,476
Total All Grades	60,486	62,007	62,752	60,018	62,055	64,881

Imports and Exports

Imports of paper, paperboard and products in January 1980 held close to the level of the previous three months and indeed close to the average of all of 1979. Comparisons with the year-ago level also tend to be midleading in that both imports and exports in January 1979 were well below the rates maintained during the last eleven months.

Imports of newsprint, at 619,000 tons, were slightly above the average level of 1979, but imports of most grades of printing and writing papers tended to be below their 1979 average levels. Coated printing and impregnated paper imports were well below their average 1979 level, and even imports of uncoated groundwood papers fell below the 1979 average.

Continued on Page 12

Continued from Page 11

Exports of paper, paperboard and products, on the other hand, were quite strong, coming in about 16% over their average 1979 level. Exports of packaging and industrial papers were particularly high, and unbleached kraft linerboard and bleached kraft paperboard also made good gains.

On a dollar basis, exports were valued at $306 million in January 1980, about 9% over the average 1979 monthly level. The dollar value of imports, at $443 million, was about 11% over the average 1979 monthly level.

Capital Expenditures

The high interest rates of both short and long term securities and the relatively tight money policy of the Federal Reserve System have not made any serious impact on capital expenditure plans of paper and allied products companies for 1980. The Department of Commerce, in a report released in mid-March, reported that expenditures for new plant and equipment by paper and allied products companies would total $6.01 billion in 1980; 23% above the revised total of $4.88 billion spent in 1979. Both these totals were slightly above the earlier estimates published by Commerce. The report also noted that the year-end carry-over of plant and equipment projects in the paper and allied products industry was in excess of $4 billion on a seasonally adjusted basis, also a record high.

Newly released data by The Conference Board on capital appropriations of those paper companies listed among the thousand largest companies in the United States also confirm the immediate gain expected in these expenditures but also gave evidence of moderation in the longer run. The Conference Board reported that capital appropriations by these companies in the fourth quarter of 1979 amounted to $748 million. While this was 14% below the total of the previous quarter and 12% below the year-ago total, it was ranked with the higher quarterly totals of the past six years. In addition, this brought the 1979 total appropriations to $4.3 billion, 36% above the previous high established in 1974 and 55% above the 1978 total. After adjustment for changes in prices, the 1979 total was about 7% below the peak 1974 price adjusted level, but still 47% above the price adjusted 1978 total.

The capital appropriations totals for 1979 were well above the level of capital expenditures by these companies. The backlog of unspent appropriations as of the end of 1979 was at a record high level, both on a current and constant dollar basis. The backlog in current dollars was equivalent to about one and one-half years of capital expenditures. These large companies accounted for about 62% of the total capital expenditures reported for paper and allied products companies in 1979.

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

March 27, 1980

	PRODUCTION (000 TONS)					
	Feb. 1980	Jan. 1980	Feb. 1979	Jan - Feb. 1980	Jan - Feb. 1979	% Change 80/79
PAPER GRADES	P	R				
Newsprint	368	376	308	743	624	19.2
Uncoated Groundwood (s)	114	125	110	239	224	6.5
Coated Paper (s)	377	435	353	811	716	13.3
Uncoated Free Sheet Paper (s)	664	723	593	1388	1215	14.2
Thin Paper (c)	29	31	30	60	61	-1.0
Cotton Fiber Paper (s)	11	12	10	23	20	13.9
Bleached Bristols (c)	79	80	91	159	184	-13.4
Tissue Paper	360	382	349	742	708	4.9
Unbleached Kraft Packaging & Indl. Converting (s)	325	346	319	671	636	5.5
Other Paper (c)	155	155	132	310	269	15.4
TOTAL PAPER	2481	2665	2294	5146	4656	10.5
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1162	1213	1081	2375	2213	7.3
Other Kraft Paperboard	87	104	87	191	191	-0.0
Semichemical Paperboard	395	423	347	818	722	13.4
Bleached Paperboard	323	347	328	670	648	3.3
Recycled Paperboard	621	649	608	1270	1255	1.2
TOTAL PAPERBOARD	2587	2737	2451	5324	5029	5.9
CONSTRUCTION & WET MACH GRADES(c)	270	265	270	535	552	-3.0
TOTAL PAPER AND PAPERBOARD	5338	5667	5015	11005	10237	7.5
HARD PRESSED BD.[not in total](c)	155	150	155	305	321	-5.0

WOOD PULP (ALL GRADES)	Feb. 1980	Jan. 1980	Feb. 1979	Jan - Feb. 1980	Jan - Feb. 1979	% Change 80/79
Dissolving & Special Alpha	125	146	92	270	190	42.0
Bleached Sulphite	122	114	84	237	159	49.0
Unbleached Sulphite	32	33	31	64	64	0.8
Bleached & Semi-Bl. Sulph.	1548	1651	1391	3199	2834	12.9
Unbleached Sulphate	1647	1730	1544	3376	3147	7.3
Semichemical	331	353	300	684	620	10.3
Groundwood and Thermo-Mechanical	359	364	341	723	689	4.9
TOTAL PULP DIVISION DATA	4163	4390	3783	8553	7703	11.0
Defib. Exploded & Scrngs E	217	214	224	845	919	-8.0
TOTAL WOOD PULP PRODUCTION	4381	4604	4007	9398	8622	9.0

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments   R - Revised   E - Estimate
P - Preliminary   (c) - Census Data - Production, last 2 months estimated.

March 31, 1980

	Full Year		INDUSTRY DATA			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1978	1979	December	January	February	1980	
Total Production (API).......¦ ¦...	62055	64881	4954	5667	5338	66028	7.5
Total Seasonally Adjusted....¦ excluding ¦...			5538	5632	5439	66427	5.5
Imports (including Products).¦hard pressed¦..E	9117	9125	766	771	735	9035	0.0
Exports (including Products).¦ board ¦..E	3373	3672	335	355	320	4050	31.8
Apparent Consumption.........¦ ¦...	67799Ra	70334 Rb	5970	6048	3854	71412c	3.6
Paper Production % Tonnage Capacity...........	93.0s	95.6 s'	86.0	96.9	95.9	97.0sh	
Paperboard Production % Tonnage Capacity......	92.8s	94.8 s	81.2	94.0	95.1	94.5s	
	1978	1979	November	December	January	1980	
MARKET WOOD PULP PRODUCTION - Tons (000).........	5165	5723	509	485	562	6740	51.8
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	47228	49717	4255	3874	4390	52676	12.0
WOOD PULP IMPORTS - TONS (000)..................	4025	4324	373	347	365	4381	10.3
WOOD PULP EXPORTS - TONS (000)..................	2599	2935	255	290	212	2549	29.0
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS	1978	1979	November	December	January	1980	
Wood Pulp..(k).............................	47947	50133	4241	3881	4353	52235	7.2
Waste Paper....(d).........................	14760	15400	1397	1258	1289	15464	4.4
Other (Census)...............................E	778 R	643	51	47	55	660	-3.5
Total...............	63485 R	66176	5689	5186	5697	68359	6.4
..WOOD PULP - NON PAPER.........................E	884	909	74	75	75	900	-4.3
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	77290	79566	6723	6057	6923	83076	8.1
EMPLOYMENT (000)	1978	1979	December	January	February	1980	
Paper and Allied Products..........Total......	700.9	714.1	714.0	712.2	710.2	711.2	1.4
Pulp, Paper and Board Mills........Total.....E	267.0	271.2	273.1	272.8	272.0	272.4	3.5
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products....................	6.52	7.12	7.48	7.46	7.47	7.47	9.5
Pulp, Paper Mills...........................E	7.44	8.26	8.71	8.69	8.70	8.69	11.2
Paperboard Mills............................E	7.68	8.38	8.82	8.84	8.85	8.84	10.4
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS	1978	1979	1979 Q4	1980 Q1	1980 Q2	1980	
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	3.46	4.88	5.23	5.52	6.21	6.01Y	23.2
INDEX OF OUTPUT PER MAN-HOUR (1967=100).........	1977	1978	October	November	December	1979	
¦IN PULP, PAPER ¦...Production Workers.......RS	148.1	153.9	162.1	163.3	165.5	159.2	3.4
¦AND BOARD MILLS¦...All Employees............RS	144.0	148.4	156.3	157.3	159.2	153.4	3.3
PAPER AND ALLIED PRODUCTS (Million $)	1978	1979	November	December	January	1980	
Industry Shipments (Dept. of Commerce)*.......	57654	66033	5585	5492	6147	73764	23.1
Pulp, Paper and Paperboard*.................	25343	30165	2608	2623	2784	33408	25.5
Inventories (End of Period) - Total Industry*.	5875	6779	6615	6779	6864	6864	17.0
Pulp, Paper and Paperboard*.................	2006	2321	2258	2321	2346	2346	18.8
	1977	1978	1979 Q1	1979 Q2	1979 Q3	1979	
Sales (Corporations Only, FTC)................	45750	48982	12997	13828	14133	54611	13.3
Earnings (Corporations Only, FTC).............	2367	2598	867	917	1162	3928	58.0
Depreciation (Corporations Only, FTC).........	1663	1726	447	479	481	1876	9.8
Net Worth (Corporations Only, FTC)............	19704	20794	21282	21808	22688	22688	12.3
PRICE INDEXES (Bureau of Labor Stats)1967=100	1978	1979	December	January	February	1980	
Total Pulp, Paper and Allied Products.........	195.6	218.9	231.0	237.4	238.9	238.2	14.6
Wood Pulp.....................................	266.5	314.7	339.9	358.8	358.5	358.7	23.1
Waste Paper...................................	191.2	206.6	221.2	222.7	223.2	223.0	15.2
Paper...	206.1	229.6	243.0	245.5	247.5	246.5	12.3
Paperboard....................................	179.6	202.1	215.4	221.8	223.4	222.6	17.6
PAPER DEMAND (INDEXED: 1967=100)	1978	1979	December	January	February	1980	
Total Paper Production *.....................	135.3	142.3	141.7	149.3	143.9	146.6	8.5
Paper New Supply *...........................	132.8	137.8	137.2	142.5	137.6	140.0	5.7
Total End - Use Index *.....................	139.5	144.5	145.5	146.1	146.5	146.3	1.4
Production of Nondurable Goods *...(19%)..	157.0	163.3	164.5	165.4	165.5	165.5	2.5
Disposable Income (Constant $) *...(23%)..	145.2	148.5	149.1	149.7	149.0	149.4	0.5
Total Printing and Publishing *...(58%)..	131.5	136.8	137.8	138.4	139.2	138.8	1.4
Trend Factor	-----------	-----------	----------	--Not Available--	----------	-----------	----------
PAPERBOARD DEMAND (INDEXED: 1967=100)	1978	1979				1980	
Total Paperboard Production *...............	132.8	138.8	145.8	143.9	138.8	141.4	4.0
Production for Domestic Use	131.1	136.7	145.7	139.6	135.6	137.6	1.7
Total End - Use Index *....................	147.7	151.6	150.7	150.8	151.6	151.2	-0.3
Production of Consumer Goods *...(60.49%)	149.1	150.3	148.3	147.8	149.2	148.5	-1.7
Production of Equipment *...(6.62%)	132.8	142.1	145.1	145.8	146.1	145.9	4.1
Production of Materials *...(32.89%)	148.3	156.0	156.1	157.2	157.1	157.1	1.3
Trend Factor	-----------	-----------	----------	--Not Available--	----------	-----------	----------
NEWSPRINT MARKETS	1978	1979	November	December	January	1980	
Consumption by Publishers - Tons (000)........	10872	11240	1001	974	870	10436	1.5
Newspaper Pub. and Printing Emp. Total (000)..	407.4	420.7	428.4	429.4	428.9	428.9	3.8
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	115090	119368	12940	10245	7434	89208	2.8
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	17586	19721	1699	1643	1834	22008	19.2
Inventories (End of Period)	1482	1695	1657	1695	1695	1695	19.0
Paper Only.............................Sales	13078	14788	1269	1218	1319	15828	16.5
Inventories (End of Period)	1025	1141	1090	1141	1152	1152	16.8
RETAIL TRADE (Million $)	1978	1979	December	January	February	1980	
Total Retail Sales *........................	798818	862236	77000	79548	78984	951192	11.7
Nondurable Goods Stores Sales *..............	520902	578966	51247	52517	52252	628614	14.3
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)*.	146.1	152.1	152.2	152.7	153.0	152.9	0.7
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	209.3	235.5	249.4	254.7	259.8	257.3	15.7
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	195.4	217.4	229.9	233.2	236.4	234.8	14.0
	1978	1979	November	December	January	1980	
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	275.6	311.3	307.6	311.3	309.0	309.0	12.2
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).	1977	1978	1979 Q2	1979 Q3	1979 Q4	1979	
G.N.P. or Expenditure - Current $.............	1899.5	2127.6	2329.8	2396.5	2456.9	2368.8	11.3
G.N.P. OR Expenditure - 1972 $................	1340.5	1399.2	1422.3	1433.3	1440.3	1431.6	2.3

lb/capita	Popul.(mil)
.a - 621	218.5
.b - 638	220.4
.c - 644	221.7

.d - 1977 - 12103; 1978 - 12481
. 1979 12,962
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1978 - 3,140; 1979 - 3,018; 1980 A.R.Y-T-D 2,568 (000 tons)
s - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '78 - 1,666; '79 - 1,593 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
* - Seasonally adjusted

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MONTHLY STATISTICAL SUMMARY

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New High in Paper and Paperboard Production

Paper and paperboard production in the first quarter of 1980 established a new quarterly high of 16.8 million tons, 5.5% above the first quarter 1979 total. Even though there was one more day in the first quarter of 1980 because of leap year, the seasonally adjusted rate also established a new high at 66.5 million tons per year, 4-½% above the seasonally adjusted rate of the first quarter 1979. However, in the early months of 1979 there were strikes in the industry. A better indication of the trend is the 2-½% increase in the seasonally adjusted rate of production over the 1979 average level.

The rate of paper and paperboard production has been in a general uptrend since at least the first quarter of 1977, when the seasonally adjusted rate of production was at 59.3 million tons per year. Thus, in the space of three years the rate of paper and paperboard production rose by 12.2% or 3.9% per year.

Within the grade structure, the production trends in the first quarter of 1980 continued along the lines evident during the past three years, with the major gains in printing and writing paper grades and in containerboard paperboard grades. The rate of newsprint production in the first quarter of 1980 was 17% over the first quarter 1979 level, reflecting the increases in capacity that came on stream during the course of 1979. Total printing and writing paper

Continued on Page 2

Continued from Page 1

production showed a 9% gain over its year-ago quarter, with the seasonally adjusted rate about 8% ahead of the 1979 average level.

Among the printing/writing paper grades the strongest gains occurred in coated paper and uncoated free sheet papers and in production of cotton fiber papers. Output of unbleached kraft papers, sparked by a strong market for multi-wall sacks and strength in demand for grocers bags and sacks, rose 4-½% over its year-ago level. The 1980 data on other packaging and industrial converting papers as reported by Census appear to be inconsistent with data reported for the early months of 1979, so the percent change over the year-ago has been deleted from the table. Note, however, that the estimated first quarter 1980 rate of 2 million tons per year is about 7-½% above the revised 1978 total. API data on the commodity grades of bleached paper production, i.e., wrapping, bag and sack and converting other than specialty packaging show first quarter production about equal to its year-ago level.

Total paper production in the first quarter of 1980 was at a seasonally adjusted rate of 31 million tons per year, about 4% over the 1979 average level, clearly establishing a new quarterly high on both an adjusted and unadjusted basis. In fact, the 2,708 thousand tons of paper produced in March 1980 appears to have established a new monthly high, moving above the record 2,695 thousand ton high established in January 1980. The highest monthly production total in 1979 was the 2,654 thousand tons produced in October.

While paperboard production was also at fairly high levels, it did not show the strength of the paper grades. The reported first quarter 1980 total of 8.12 million tons was 3.7% ahead of the year-ago level. On a seasonally adjusted basis, the rate was 32.3 million tons per year, 2% over the 1979 annual average rate.

The strongest gains continued, as noted earlier, in the containerboard grades. Production of containerboard for domestic use moved 4% ahead of its year-ago total, compared to a 1% increase in shipments of fiber boxes. However, inventories at both fiber box plants and paperboard mills are still fairly low.

Production of boxboard for domestic use and, indeed, total production of boxboard for all purposes was a little below its year-ago level in the first quarter of 1980. Although total folding boxboard production showed little change from its year-ago level, both bleached and recycled clay coated paperboard were above their year-ago levels.

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

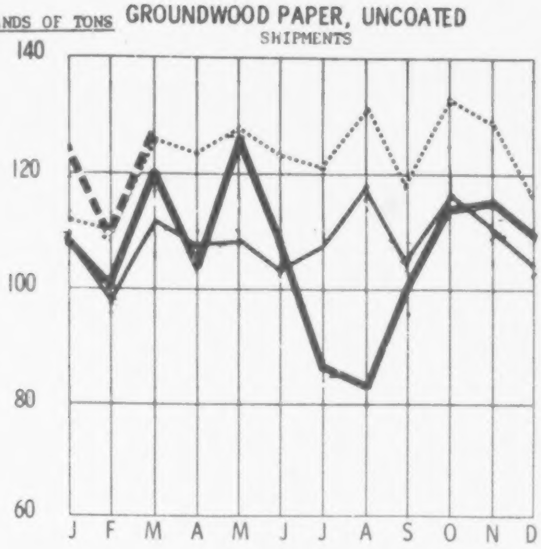
	YEAR 1978	 1979	DEC. 1979	JAN. 1980	FEB. 1980	MARCH 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint - Production	3768	4062	339	376	368	394	4550	17.1
- Shipments	3779	4066	347	369	367	387	4493	15.6
Printing & Writing	14541	15467	1246	1417	1296	1414	16506	9.0
Groundwood Paper - Shipments	1309	1474	118	125	108	128	1445	3.4
- New Orders	1367	1472	107	156	110	133	1597	5.4
- Unfilled Orders	179	181	181	167	173	179	179	-12.9
Coated Paper - Shipments	4448	4510	366	433	387	416	4943	9.5
- New Orders	4428	4519	364	479	404	375	5029	10.6
- Unfilled Orders	404	436	436	397	422	379	379	-7.4
Unctd Free Sheet - Shipments	7225	7868	635	726	676	735	8548	12.2
- New Orders	7542	7805	602	740	641	697	8312	7.3
- Unfilled Orders	754	688	688	760	786	736	736	-3.4
Thin Paper - Production *	350	376	28	31	29	35	382	0.2
Cotton Fiber Paper - Shipments	114	125	10	12	11	12	143	11.6
Bleached Bristols -Production*	1095	1114	90	89	85	87	1045	-5.1
Tissue Paper - Production	4215	4525	337	384	368	390	4566	2.8
Total Packaging & Other Paper	5789	5754	463	518	505	510	6134	9.5
Unbl. Kraft Paper - Shipments	3884	3963	305	346	335	340	4084	4.6
Other Paper - Production * #	1905	1791	159	172	170	170	2049	NC
TOTAL PAPER-Production-Unadj.	28313	29808	2386	2695	2536	2708	31755	9.2
-Production-S.A.			2509	2634	2570	2564	31072	8.2
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	22790	23947	1774	2088	1966	2130	24734	5.2
Unbl. Kraft Linerboard - Total	13228	14076	1064	1212	1162	1248	14485	5.9
Production for Export	1466	1621	120	175	147	160	1929	29.0
Other Unbl. Kraft Paperboard	1144	1127	58	106	97	107	1198	-2.0
Semichemical Paperboard	4439	4721	359	424	395	425	4976	8.9
Production for Export	119	92	4	11	12	12	138	43.6
Solid Bleached Paperboard	3979	4023	295	347	323	349	4075	0.8
Production for Export	430	466	32	43	47	45	539	20.5
Recycled Paperboard	7485	7683	572	651	621	661	7731	-0.8
Production for Export	22	22	3	2	2	4	34	67.7
TOTAL PAPERBOARD-Prod.-Unadj.	30275	31631	2346	2739	2587	2791	32465	3.7
- Containerboard Prod.(Dom. Use)	17908	19031	1460	1611	1550	1669	19319	4.4
- Boxboard Production (Dom. Use)	6505	5897 ###	428	507	470	511	5953	-2.0
- All Other P'bd Prod.(Dom. Use)	3825	4503 ###	299	390	359	399	4553	-1.9
- Total Paperbd Prod. for Export	2037	2200	159	231	208	222	2640	28.2
TOTAL PAPERBOARD PROD. - S.A.			2773	2739	2637	2691	32267	2.8
WET MACHINE BOARD *	136	144	16	13	15	16	177	35.5
BUILDING PAPERS *	1915	1900	137	136	140	150	1704	-10.2
INSULATING BOARD *	1416	1422	93	96	95	110	1206	-15.4
TOTAL ALL GRADES - Unadjusted	62055	64904	4978	5679	5373	5775	67307	5.5
- Production - S.A.			5562	5618	5423	5520	66539	4.4
HARD PRESSED BD. [not in total]*	2294	2123	137	158	160	170	1950	-3.6

* Census Data - Production. Last two months estimated.
# Production excludes API bleached kraft envelope.
## Includes revisions not available monthly.
### Data on unbleached kraft folding boxboard for 1979 and 1980 included in All Other Paperboard Prod.(Dom. Use)

S.A. Seasonally Adjusted
P Preliminary
R Revised
NC Not Comparable to 1979

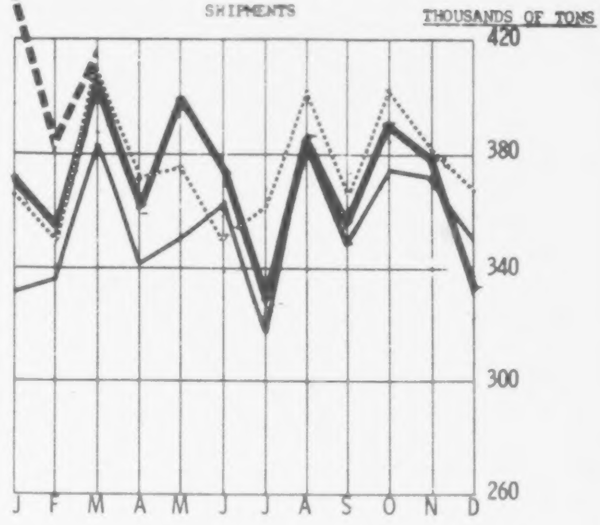
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



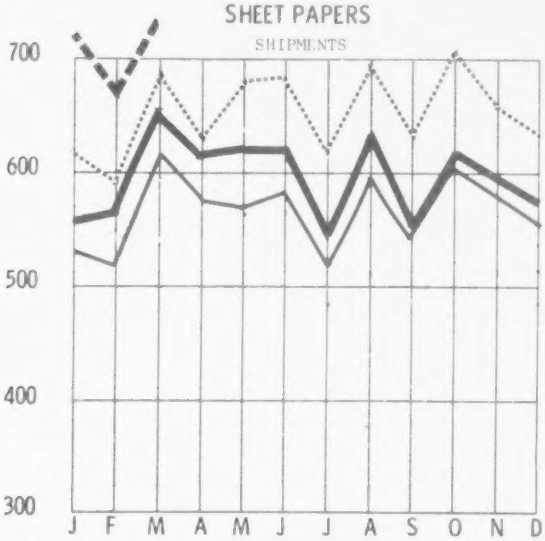
COATED PAPER

SHIPMENTS



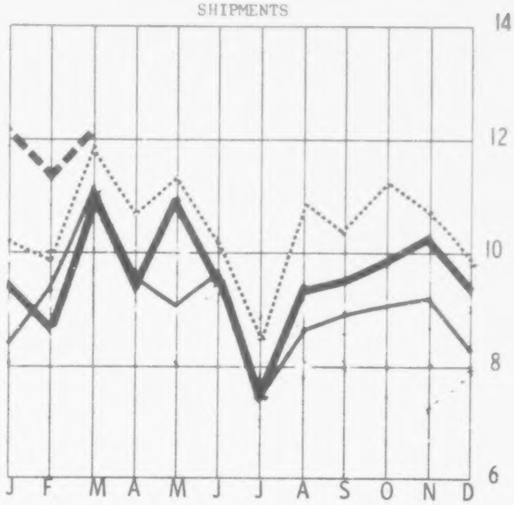
UNCOATED FREE SHEET PAPERS

SHIPMENTS



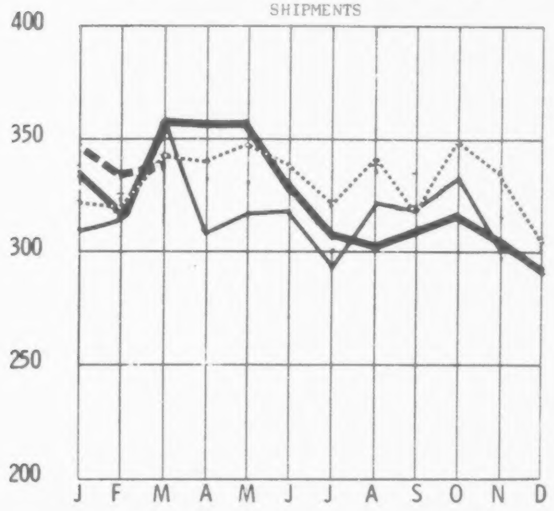
COTTON FIBER PAPER

SHIPMENTS



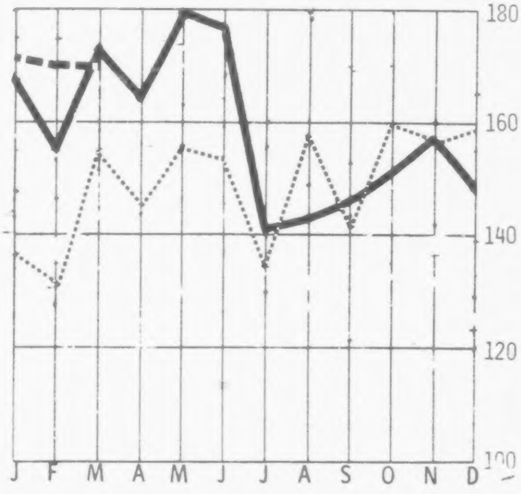
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1977 —— 1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

WOOD PULP STATISTICS

(Thousands of Tons)

	YEAR 1978	1979	NOV. 1979	DEC. 1979	JAN. 1980	FEB. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
TOTAL WOOD PULP (1)					R	P		
Total Wood Pulp - Production	47228	49717	4255	3874	4390	4163	51318	11.0
- Imports	4025	4324	373	347	355	328	4159	2.3
- Exports	2599	2935	255	290	312	269	2889	32.9
- New Supply	48653	51106	4373	3931	4542	4222	52588	9.3
Dissolving Pulp - Production	1411	1497	130	118	146	125	1622	42.0
- Imports	189	193	20	22	25	21	279	78.6
- Exports	758	764	67	75	43	54	585	-1.7
- New Supply	842	926	83	64	128	92	1316	87.2
Paper Grades Chemical Pulp - Production	37893	39768	3410	3092	3528	3349	41259	10.8
- Imports	3627	3930	340	311	325	301	3755	1.8
- Exports	1780	2100	180	209	160	210	2216	43.7
- New Supply	39740	41597	3570	3194	3693	3440	42797	8.7
Groundwood and Thermo-Mech. - Production	4141	4385	371	355	364	359	4335	4.9
- Imports	208	201	13	14	15	6	125	-43.7
- Exports	62	70	8	6	10	5	88	143.0
- New Supply	4287	4516	376	364	369	360	4372	1.2
Semi-Chemical - Production	3783	4068	344	310	353	331	4102	10.3
- Imports	0	0						
- Exports	0	0	------	Included	with	Groundwood	Pulp	------
- New Supply	3783	4068	344	310	353	331	4102	10.3
MARKET WOOD PULP								
Total Market Wood Pulp - Production	5165	5723	509	485	562	514	6455	42.9
- Imports	2816	3046	265	233	276	238	3089	3.6
- Exports	2480	2784	249	262	219	272	2944	43.9
- New Supply	5501	5985	525	456	619	481	6600	21.1
Dissolving Pulp - Production	1406	1497	130	117	145	124	1618	39.6
- Imports	291	306	25	16	17	16	196	-36.0
- Exports	824	869	77	86	56	66	731	22.3
- New Supply	873	934	78	48	106	74	1084	24.8
Paper Grades Chemical Pulp - Production	3675	4163	372	362	410	384	4762	42.1
- Imports	2495	2734	240	217	259	221	2882	8.1
- Exports	1613	1870	168	173	155	202	2143	51.6
- New Supply	4557	5027	444	405	514	403	5501	19.5
Groundwood Pulp and All Other - Production	83	63	7	6	6	6	75	1288.9
- Imports	26	7	0	0	1	1	11	80.0
- Exports	42	46	4	4	8	4	71	103.4
- New Supply	67	24	3	2	0	4	15	-164.1

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1978 - 3,140; 1979 - 3,018; A.R.Y-T-D'80 - 2,604

SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

FIBROUS RAW MATERIALS

(Thousands of tons)

	1978	1979	NOV. 1979	DEC. 1979	JAN. 1980	FEB. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	63485	66170	5689	5238	5696	5480	67055	7.1
Total Wood Pulp (2) A	47947	50127	4241	3875	4356	4117	50839	6.5
Market Wood Pulp A	4774	5031	411	401	439	420	5154	1.8
Waste Paper (3) A	14760	15400	1397	1316	1289	1315	15622	10.0
Rags, Straw & Other C, E	778	643	51	47	51	48	594	-10.8
INVENTORIES								
Wood Pulp at Pulp Mills A	130	107	117	107	104	109	109	-21.2
Market Pulp at Pulp Mills A	187	132	158	132	160	140	140	-15.3
Mkt Pulp at Ppr.& Bd. Mills CE	435	426	404	426	416	410	410	17.5
Waste Ppr.at Ppr.&Bd. Mills (4)	740	798	795	798	857	813	813	13.4
Rags, Straw and Other at Paper and Board Mills C, E	66	61	62	61	57	55	55	-6.8
Mkt Wood Pulp Days of Supply A	44	38	38	38	39	35	35	6.6
Wood Pulp Consumption at at Non-Paper Mills C, E	884	909	74	75	74	70	862	-5.8

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API

P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons

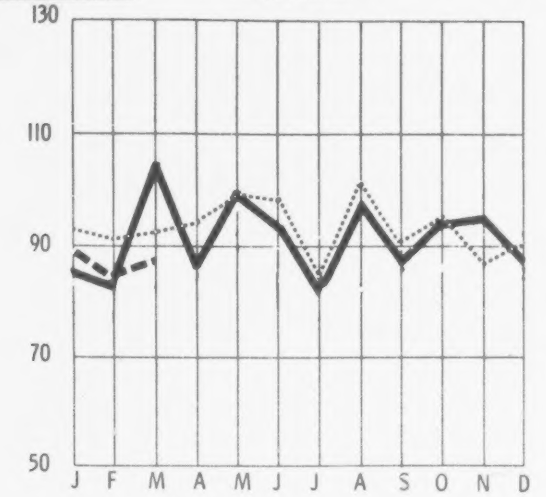
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.(000 tons): 1978 - 1,666; 1979 - 1,593

(3) Census Waste Paper Consumption, (000 tons): 1977 - 12,103; 1978 - 12,481; 1979 - 12,963

(4) Census data prior to 1979; more recent data are from the Paper Stock Conservation Committee, A.P.I.

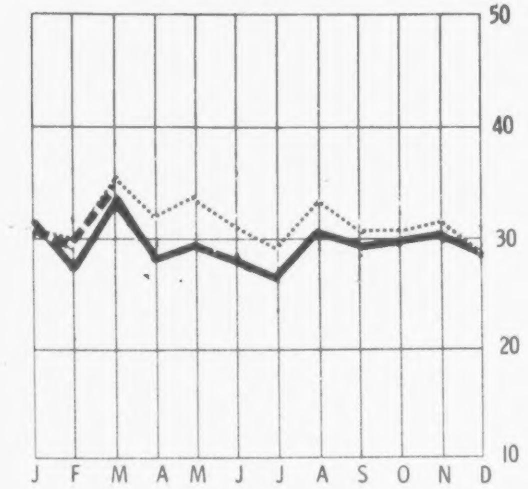
BLEACHED BRISTOLS

PRODUCTION



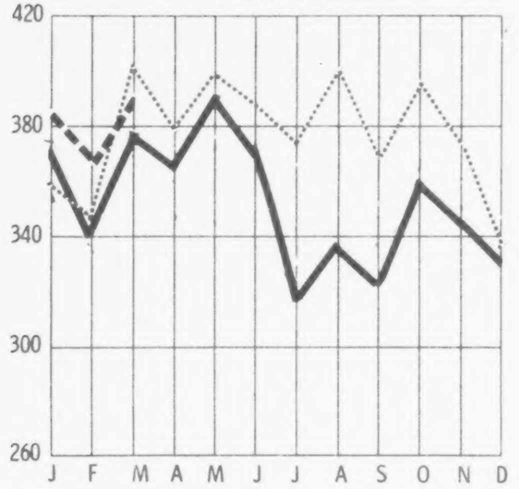
THIN PAPERS

PRODUCTION



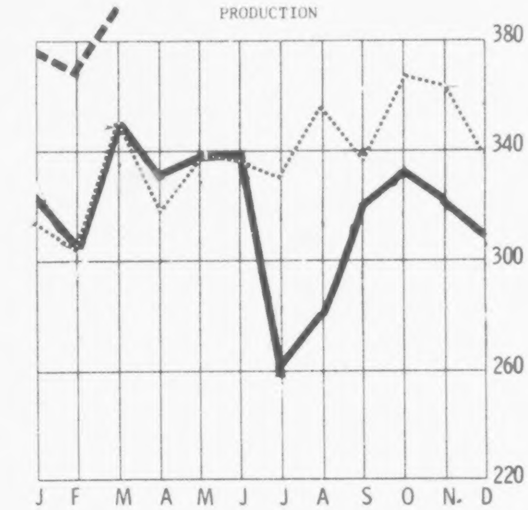
TISSUE PAPER

PRODUCTION



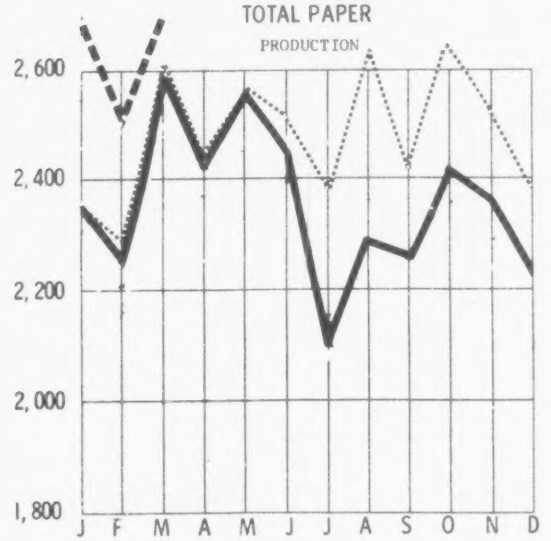
NEWSPRINT

PRODUCTION



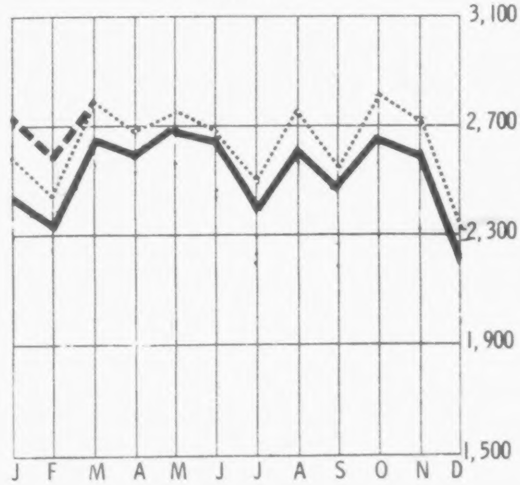
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1977 —— 1978 ━━ 1979 ········ 1980 ▬ ▬ ▬

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1978	1979	NOV. 1979	DEC. 1979	JAN. 1980	FEB. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	77025	78625	6557	6479	6906	6996	83412	18.7
	- Total Consumpt.	77290	79566	6723	6057	6923	6614	81222	6.7
	- Residues *	30369	30015	2317	2150	2415	2353	28608	4.4
	- Inventories	6244	5506	5110	5506	5320	5677	5677	5.6
So. Atlantic	- Total Receipts	25353	26126	2202	2103	2248	2195	26658	9.9
	- Total Consumpt	25204	26523	2240	1934	2320	2235	27330	5.8
	- Residues *	8513	8858	718	673	730	694	8544	1.9
	- Inventories	1191	1052	880	1052	997	987	987	3.2
Northeast	- Total Receipts	6664	7461	662	618	735	837	9432	29.5
	- Total Consumpt	6607	7584	681	595	680	635	7890	5.4
	- Residues *	1662	1670	147	113	119	153	1632	-0.4
	- Inventories	770	674	654	674	667	862	862	9.9
South Central	- Total Receipts	25572	26654	2178	2225	2281	2193	26814	12.8
	- Total Consumpt	25678	26432	2154	1999	2275	2171	26676	1.6
	- Residues *	8418	8669	655	616	737	644	8286	-3.8
	- Inventories	1194	1472	1281	1472	1485	1495	1495	75.3
North Central	- Total Receipts	5291	5630	452	569	612	656	7608	47.8
	- Total Consumpt	5330	5535	474	430	459	446	5430	-2.7
	- Residues *	1456	1501	138	117	129	122	1506	13.1
	- Inventories	968	993	857	993	1119	1317	1317	44.7
West	- Total Receipts	14145	12754	1063	964	1030	1115	12870	31.0
	- Total Consumpt	14471	13492	1174	1099	1189	1127	13896	26.5
	- Residues *	10320	9317	659	631	700	740	8640	16.2
	- Inventories	2121	1315	1438	1315	1052	1016	1016	-45.7

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

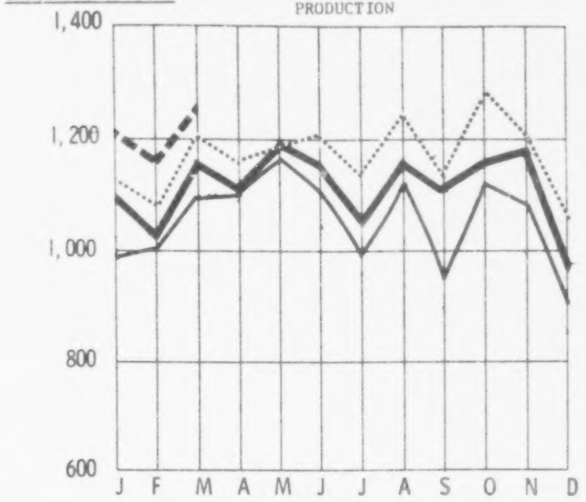
IMPORTS FROM CANADA

	YEAR 1979 Tons	$000	JAN. 1980 Tons	$000	FEB. 1980 Tons	$000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206050	8867	27971	1142	10445	413	230196	-11.4
Pulpwood Chips	1527734	30440	121955	2847	107012	2594	1373802	13.6
Wood Pulp, Total	4143944	1404354	338458	130286	325339	129445	3982782	1.0
Waste Fibrous Materials, Total	88344	13727	4737	662	6137	1023	65242	-31.9
Paper,Paperboard&Products,Total	8501965	2779223	729169	253302	722768	254706	8711619	2.1
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8457803	2725085	725411	249553	718664	248789	8664445	2.0
Paper, Total	8015574	2642945	679356	241449	664736	239846	8064547	-0.2
Newsprint	7077209	2249470	610793	209615	600513	208682	7267836	-0.4
Printing,Writing & Rel.Pap.	799355	322818	60840	27667	55632	25009	698835	5.0
Pack. & Ind. Conv. Paper	118815	57854	7141	3832	7714	4540	89131	-16.9
Special Industrial Paper	3157	3324	30	40	170	239	1201	12.5
Tissue Paper	17039	9479	551	295	707	376	7545	-53.0
Paperboard, Total	80636	17653	8789	2085	9900	2577	112129	31.1
Wet Machine Board	1522	703	81	39	112	54	1159	-30.2
Construction Paper and Bd. *	360071	63784	37185	5981	43917	7312	486610	50.0
Convtd Paper&Paperbd Products	44163	54138	3758	3750	4104	5919	47174	26.4

EXPORTS TO CANADA

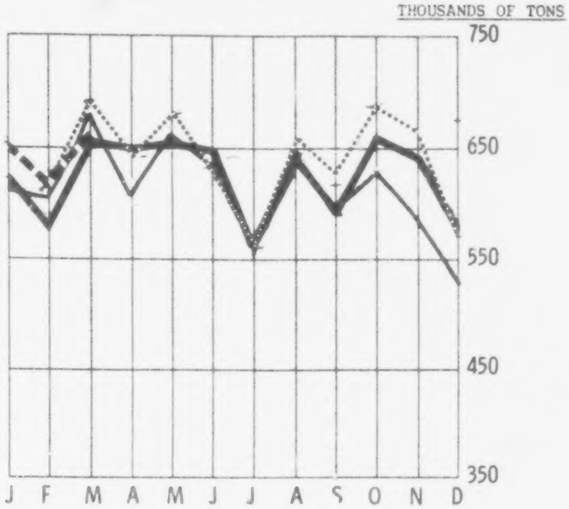
	YEAR 1979 Tons	$000	JAN. 1980 Tons	$000	FEB. 1980 Tons	$000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	263367	11446	11477	489	10041	382	129108	-75.7
Pulpwood Chips	87790	3790	1662	46	2061	54	22338	-71.7
Wood Pulp, Total	136641	49608	9068	4157	13576	4011	135864	9.4
Cotton Pulp & Other Pulp	7921	3728	883	473	1403	417	13716	115.5
Waste Paper	478477	50207	37623	3866	49261	4589	521304	46.7
Paper,Paperboard&Products,Total	624928	353202	49153	28900	56767	31998	635519	10.5
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	454029	248403	37550	20726	42238	21868	478726	15.1
Paper, Total	181451	142407	17503	12761	21395	14471	233390	38.9
Newsprint	2803	1734	113	126	206	203	1916	-52.5
Printing,Writing & Rel.Pap.	108290	76567	9718	7245	9777	7467	116966	20.5
Pack. & Ind. Conv. Paper	16084	10108	1144	617	2033	1103	19062	5.0
Special Industrial Paper	46773	48173	6354	4571	9005	5345	92158	134.6
Tissue	7502	5825	174	202	374	353	3287	-65.3
Paperboard, Total	230904	83021	17828	6971	17457	6241	211711	3.6
Wet Machine Board	5262	9916	276	148	266	141	3249	-32.9
Construction Pap. & Bd. E *	36411	13059	1943	846	3120	1015	30377	-22.0
Convtd Paper&Paperbd Products	170900	104799	11603	8175	14529	10130	156793	-1.4
* - Hard Pressed Board (not in total)								
Imports of Hard Pressed Bd.	29771	5370	1851	319	3568	697	32514	122.2
Exports of Hard Pressed Bd.	20535	6878	1764	642	1218	456	17892	-34.0

SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

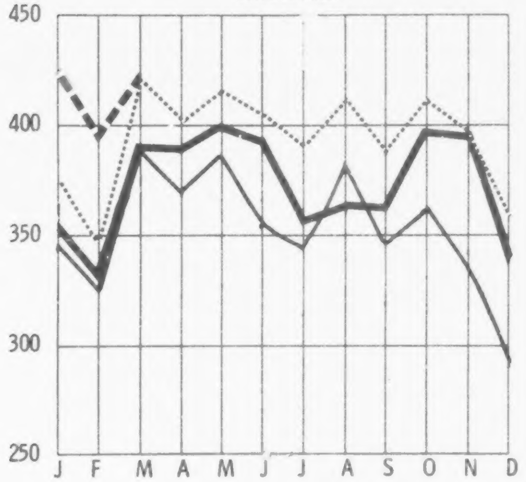


UNBLEACHED KRAFT LINERBOARD

PRODUCTION

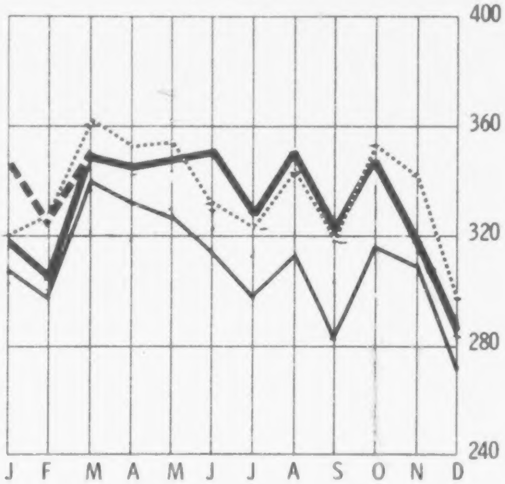


RECYCLED PAPERBOARD



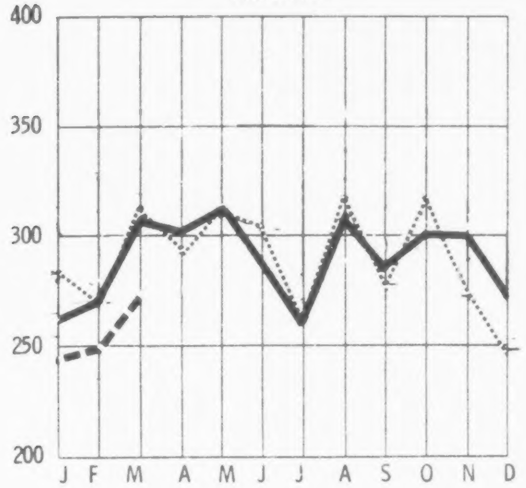
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



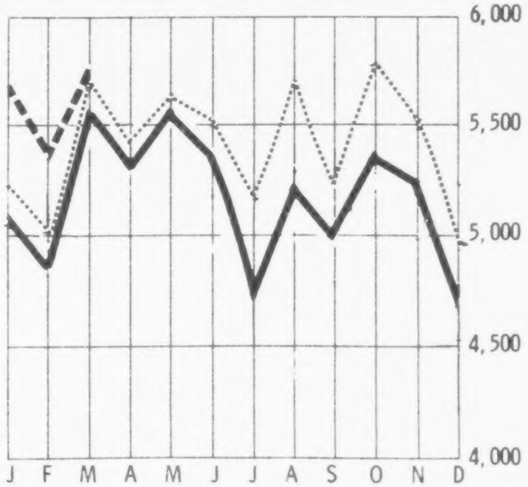
SOLID BLEACHED PAPERBOARD

PRODUCTION



WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION

1977 —— 1978 ▬▬ 1979 .... 1980 ▬ ▬ ▬

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1979 Tons	YEAR 1979 $000	JAN. 1980 Tons	JAN. 1980 $000	FEB. 1980 Tons	FEB. 1980 $000	(1) Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206074	8869	27971	1142	10415	413	230496	-11.4
Pulpwood Chips	1574763	33413	121955	2847	107012	2594	1373802	6.7
Total All Imports	13554749	4693607	1140960	437662	1106920	422900	13487280	1.9
Wood Pulp, Total	4324033	1465169	365057	139708	328147	130628	4159224	2.3
Waste Paper	62310	8625	2491	246	2534	276	30150	-55.7
Other Fibrous Materials	43640	13149	2578	616	4685	1447	43577	-25.6
Paper,Paperbd&Products,Total	9124767	3206665	770834	297092	771554	290548	9254329	2.4
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9028643	2983554	762596	267544	763850	271964	9158672	2.2
Paper, Total	8561213	2894764	714401	258955	707698	261531	8532595	0.0
Newsprint	7224195	2300450	619158	212650	623609	219653	7456602	0.5
Printing & Writing	1176253	510579	86535	41043	74803	36000	968027	-0.0
Uncoated Groundwood	804598	295996	60603	24944	49900	20879	663015	3.2
Uncoated Book	142674	69291	10206	5728	9078	4751	115701	-5.4
Coated Print.& Impreg. Pap	188846	108590	12917	7706	12981	7652	155386	-9.7
Bristols	2247	1243	40	31	50	248	537	2.6
Writing and Similar Paper	22964	23403	2030	1726	1876	1546	23434	5.1
Thin (except Cigarette)	14924	12057	741	909	918	925	9955	21.9
Total Pkg & Other Paper	143452	74013	8156	4965	8474	5444	99779	-20.7
Unbleached Kraft Paper	66816	23211	3009	1203	2788	1222	34778	-29.3
Other Pkg. & Indust. Paper	76636	50802	5147	3762	5686	4222	65001	-15.3
Tissue	17312	9722	553	297	812	435	8186	-50.8
Paperboard, Total	82203	19111	8858	2182	9946	2560	112819	30.5
Test or Containerboard	25725	6021	4950	1295	4064	1074	54095	90.6
Semi-Chemical Corrugating	33494	5889	2954	542	2870	560	34942	-15.4
Other Paperboard	22984	7201	954	344	3012	1026	23792	42.1
Wet Machine Board	2345	1341	165	106	215	137	2281	-2.7
Construction Paper & Bd. *	382883	68338	39172	6301	45990	7637	510977	49.1
Building Paper	330147	56768	35066	5384	42387	6839	464715	56.9
Insulating Board	21682	4664	1495	318	1780	425	19648	-22.9
Other Building Board	31054	6906	2612	599	1824	373	26614	26.1
Convtd Paper&Paperbd Products	96124	223111	8238	29548	7704	18584	95657	26.1
Paper Products, Total	90317	211663	7787	28646	7235	17721	90130	26.9
Paperboard Products, Total	5807	11447	451	902	470	863	5527	13.8
Notes								
Other: No Weight Avail. ($000)		81899		5807		5240	66278	-7.4
Total Imports Incl. Other($000)		4775506		443469		428140	5229649	23.1

EXPORTS

	YEAR 1979 Tons	YEAR 1979 $000	JAN. 1980 Tons	JAN. 1980 $000	FEB. 1980 Tons	FEB. 1980 $000	(1) Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cu. ft.)	263721	11473	15183	545	10309	398	152952	-71.2
Pulpwood Chips	4498674	197847	308487	18013	422841	25542	4387968	23.3
Total All Exports	8971542	3348192	807407	304557	848758	315907	9936991	35.7
Wood Pulp,Total	2934818	1103556	212395	84743	269173	108356	2889408	32.9
Cotton Pulp and Other Pulp.	131444	74579	14896	8494	11494	5911	158340	64.1
Waste and Old Paper	2233246	256108	225011	25444	239221	25071	2785392	40.6
Paper, Paperbd&Products, Total	3672034	1913949	355105	185876	328870	176570	4103851	33.5
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	3109390	1328329	306865	131185	279425	124757	3517740	38.8
Paper, Total (2)	600875	507578	66437	49114	56515	48915	737716	43.8
Newsprint	71456	32046	12414	4945	4190	2036	99622	64.4
Printing & Writing	274609	233380	23177	21660	22880	22352	276342	13.8
Uncoated Groundwood	80392	55384	5960	4199	4342	4026	61810	-19.4
Clay Coated Paper	73521	57743	6657	5749	7357	6480	84086	38.5
Uncoated Free Sheet	68159	64146	6206	7118	4972	5919	67068	13.8
Other Printing & Writing	52537	56107	4354	4594	6210	5927	63379	36.5
Total Pkg. & Other Paper (2)	226906	218218	29257	21067	26441	21816	334190	82.5
Unbleached Kraft	63695	27079	12814	4090	9313	3979	132760	182.3
Other Pkg. & Indust. Paper (2)	163211	191138	16444	16976	17128	17837	201430	48.0
Tissue	27905	23934	1590	1443	3004	2712	27563	4.5
Paperboard, Total (2)	2446903	789902	235809	79786	217003	73834	2716876	38.7
Solid Wood Pulp (2)	2271092	712276	223259	74193	205870	68779	2574771	44.3
Total Linerboard	1644901	434515	165160	47767	146780	42886	1871636	37.7
Bleached Kraft Linerboard	179995	51186	15471	4820	12321	3198	166752	-6.7
Unbleached Kraft Linerbd	1464906	383330	149689	42948	134458	39688	1704884	44.4
Other Unbleached Kraft	100301	33739	9037	2932	14896	5281	143602	71.1
Other Bleached Kraft (2)	508532	238813	48144	23189	42454	20111	545586	64.3
Semi-Chemical Corrugating	17358	5208	918	304	1740	501	15946	61.9
Recycled Paperboard	175811	77626	12551	5594	11134	5055	142105	-18.6
Wet Machine Board	7371	5146	506	321	536	270	6247	-21.4
Construction Paper & Bd. *	54241	25704	4113	1963	5370	1738	56901	2.8
Building Paper	33619	14420	2617	1089	2613	701	31381	-17.2
Insulating Board E	20623	11284	1496	874	2757	1037	25520	46.4
Convtd Paper&Paperbd Products	562643	585620	48240	54691	49445	51813	586111	9.0
Paper Products, Total	332407	427080	28929	38724	30176	37947	354633	21.1
Paperboard Products, Total	230237	158540	19311	15967	19269	13866	231478	-5.5
Notes								
Other: No Weight Avail. ($000)		9803		1131		868	11988	42.9
Total Exports Incl. Other($000)		3357995		305687		316775	3734768	46.2
* Hard Pressed Board (not in total)								
Imports of Hard Pressed Board	260775	39528	16887	2559	16699	2891	201516	-17.2
Exports of Hard Pressed Board	32030	11223	2425	862	1397	561	22932	-29.7

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

(2) Resin coated and impregnated grades over 92 lbs moved from Other Bleached Kraft P'bd to Othr Pkg & Ind. Paper

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR		OCT.	NOV.	DEC.	JAN.	Annual Rate Y-T-D	% Change from same Period Last Year
	1978	1979	1979	1979	1979	1980	1980	
PAPER					R	P		
Newsprint	3489	3797	365	351	323	385	4625	26.8
Uncoated Groundwood Papers	1569	1674	154	142	135	121	1457	-15.3
Coated Papers	4513	4675	415	400	388	415	4981	12.6
Uncoated Free Sheet (1)	7315	7508	680	646	614	689	8268	16.2
Cotton Fiber Paper (1)	119	127	11	11	10	12	149	14.8
Thin Papers	350	376	31	31	28	31	377	2.3
Bleached Bristols	1127	1114	95	86	90	89	1073	-3.5
Tissue Paper	4245	4310	392	355	328	382	4579	15.7
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3873	3923	359	355	304	342	4106	11.7
Other Paper (1)	1905	1791	160	157	159	172	2068	25.7
TOTAL PAPER GRADES	28505	29295	2661	2534	2378	2640	31682	14.0
PAPERBOARD								
Solid Wood Pulp Furnish	22500	22833	2030	1982	1765	2042	24506	13.1
Unbleached Kraft Linerboard	13215	13685	1226	1160	1039	1187	14249	7.5
Other Unbl. Kraft Paperboard	898	1014	80	90	61	92	1099	11.3
Bleached Kraft Paperboard	4002	3934	358	356	311	350	4199	23.2
Semi-Chemical Paperboard	4384	4200	366	376	354	413	4960	23.4
Recycled Paperboard	7534	7240	668	624	594	643	7720	6.3
TOTAL PAPERBOARD GRADES	30034	30073	2698	2606	2358	2686	32226	11.4
WET MACHINE BOARD	136	144	15	14	16	13	160	51.1
CONSTR. PAPER & INSUL. BOARD	3332	3322	299	265	230	233	2791	-14.8
TOTAL ALL GRADES [Excl. H.P.B.]*	62006	62834	5674	5419	4983	5572	66859	11.2

PRODUCER PRICE INDEXES

1967 = 100

	1978	1979	DEC.	JAN.	FEB.	MARCH		
Pulp, Paper and Products	195.6	219.0	231.0	237.4	238.9	241.6	239.3	14.3
Pulp, Paper & Products, except Waste Paper #	195.6	219.1	231.2	237.6	239.2	241.9	239.6	14.4
Total Wood Pulp	266.5	314.5	339.9	358.8	358.5	359.0	358.8	22.7
Total Paper	206.1	229.6	243.0	245.5	247.5	250.5	247.8	12.2
Total Paper, exc. Newsprint	199.4	222.8	234.7	238.0	240.3	244.4	240.9	12.3
Newsprint	226.3	249.9	268.2	268.2	269.4	269.4	269.0	12.1
Total Paperboard	179.6	202.1	215.4	221.8	223.4	225.9	223.7	17.4
Total Paper and Paperboard #	197.8	220.9	234.3	238.1	239.9	242.8	240.3	13.8
Converted Products	186.5	209.7	220.3	227.5	228.7	231.3	229.2	14.2
Waste Paper	191.2	206.6	221.2	222.7	223.2	224.9	223.6	13.7
All Commodities	209.3	235.5	249.4	254.7	259.8	261.5	258.7	15.6
Industrial Commodities	209.4	236.4	252.8	260.3	265.4	268.2	264.6	18.9

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. # Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Among the other grades of bleached paperboard, production of heavy weight cup stock, bleached paperboard for miscellaneous uses and for export showed strong gains. Recycled boxboard production was down. Gypsum wallboard facing, used largely in residential construction was about 6% below its year-ago level in the first quarter of 1980, and down 12% from March 1979 to Marc h 1980.

Preliminary estimates indicate that production of construction and similar grades of paper and board, strongly influenced by residential housing trends, declined 11% from the first quarter of 1979 to the first quarter of 1980.

Imports, Exports, New Supply

Imports of paper, paperboard and products in the first two months of 1980 were close to their year-ago level and also close to their 1979 average level. However, the 1980 grade pattern was somewhat different than 1979's. Imports of newsprint were up a bit in percentage terms, running about 7.5 million tons a year, compared to 7.2 million tons for the 1979 average. However, imports of printing/writing grades were down sharply. Uncoated groundwood paper imports, in particular, which exceeded 800,000 tons in 1979, were at an annual rate of only 663,000 tons in the first two months of 1980. Imports of uncoated book and printing papers were also down sharply, as were imports of packaging papers. Imports of paperboard were up, but the tonnages were small: the 1979 average was 82,000 tons; the rate in the first two months of 1980 was 113,000 tons per year.

The decline in imports of the printing/writing grades indicates that whatever weakness that has occurred so far this year in the demand for these products was concentrated on the import grades. As noted above, U.S. production of these grades was at record high levels.

Imports of wood pulp, which had shown a strong gain in 1979, climbing to 4.3 million short tons as reported by the Bureau of Census, were fairly strong, running at 4.16 million tons per year in the first two months of 1980.

Exports of paper, paperboard and products in the first two months of 1980 were relatively high, at an annual rate of 4.10 million tons, compared to the 1979 total of 3.67 million tons. Exports of printing/writing grades were close to the average rate for 1979 as a whole. Among the other paper grades, the major increase in exports was in the packaging and special industrial grades, where the rate for the first two months was 334,000 tons per year, compared to the 1979 total of 227,000 tons.

Technical Note: On the basis of a restudy of the products included in the heavier weights of miscellaneous resin coated and impregnated papers, these grades were shifted from bleached kraft paperboard to special industrial papers. The data published on page 9 include these revisions.

Continued on Page 12

Continued from Page 11

The major gains in exports occurred in the paperboard grades. For the first two months of 1980 exports of total paperboard were at an annual rate of 2.7 million tons, compared to 2.45 million tons for all of 1979. The gains were concentrated in total linerboard, other unbleached kraft and bleached kraft paperboard grades.

With the imports showing only modest increases and exports up sharply, the total new supply showed a somewhat smaller increase than did the production. The first quarter 1980 new supply rate is estimated at an annual rate of 71.8 million tons, about 3% over its year-ago level, compared to the 4.4% gain in seasonally adjusted rates of total production. The gain in new supply compares to a gain of only 1% in the real gross national product, no change in total industrial production and a 2% increase in production of non-durable goods for this same period.

Earnings

Net sales of 31 paper and allied products companies reported in the press for the first quarter of 1980 amounted to $9.80 billion, 14% over the corresponding year-earlier total. After-tax profits of these companies, based on continuing operations and before extraordinary gains, rose 5.5%, as the margin on sales declined from 6.4% in the first quarter of 1979 to 5.9% in the first quarter of 1980.

Many of these companies, however, are heavily involved in wood products industries, where sales were severely depressed. The impact of the decline in housing starts and hence in demand for wood products generally, is shown more clearly in reports of income and sales by 4 companies with large holdings in the paper industry but whose major line of activity is outside the paper industry, largely wood products. Their first quarter 1980 sales amounted to $2.96 billion, 11.4% over their first quarter 1979 total. Profits of these companies declined about 19% as their margin on sales dropped from 8.8% in the first quarter of 1979 to 6.4% in the first quarter of 1980.

The Federal Trade Commission has recently released its paper and allied products company data for the fourth quarter of 1979, which permits the calculation of sales and earnings and other financial data for the entire year. The Federal Trade Commission report showed fourth quarter 1979 sales of paper and allied products rose slightly over the third quarter 1979 level, but earnings fell sharply. (See Industry Data Sheet)

These FTC figures show total 1979 sales at paper and allied products companies at $55,359 million, up 13% from the 1978 total. Profits after tax were $3,723 million, 43% above the corresponding 1978 figure. The net cash flow from operations, which includes after-tax profits plus $1,896 million for depreciation, less $974 million in dividends, amounted to $4,645 million. Note that this total fell a little short of the $4,880 million spent by paper and allied products companies on plant and equipment in 1979.

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INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

APRIL 30, 1980

	PRODUCTION (000 TONS)					
	March 1980	Feb. 1980	March 1979	Jan -March 1980	- 1979	% Change 80/79
PAPER GRADES	P	R				
Newsprint	394	368	348	1137	972	17.1
Uncoated Groundwood (s)	128	108	125	361	349	3.4
Coated Paper (s)	416	387	412	1236	1128	9.5
Uncoated Free Sheet Paper (s)	735	676	690	2137	1905	12.2
Thin Paper (c)	35	29	35	95	95	0.2
Cotton Fiber Paper (s)	12	11	12	36	32	11.6
Bleached Bristols (c)	87	85	92	261	275	-5.1
Tissue Paper	390	368	403	1142	1111	2.8
Unbleached Kraft Packaging & Indl. Converting (s)	340	335	340	1021	976	4.6
Other Paper (c)	170	170	156	512	425	NC
TOTAL PAPER	2708	2536	2612	7939	7268	9.2
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1248	1162	1205	3621	3418	5.9
Other Kraft Paperboard	107	87	115	299	306	-2.0
Semichemical Paperboard	425	395	421	1244	1142	8.9
Bleached Paperboard	349	323	362	1019	1010	0.8
Recycled Paperboard	661	621	694	1933	1949	-0.8
TOTAL PAPERBOARD	2791	2587	2796	8116	7825	3.7
CONSTRUCTION & WET MACH GRADES(c)	276	250	312	772	863	-10.6
TOTAL PAPER AND PAPERBOARD	5775	5373	5719	16827	15956	5.5
HARD PRESSED BD.[not in total](c)	170	160	185	488	506	-3.6

WOOD PULP (ALL GRADES)	Feb. 1980	Jan. 1980	Feb. 1979	Jan - Feb. 1980	- 1979	% Change 80/79
Dissolving & Special Alpha	125	146	92	270	190	42.0
Bleached Sulphite	122	114	84	237	159	49.0
Unbleached Sulphite	32	33	31	64	64	0.8
Bleached & Semi-Bl. Sulph.	1548	1651	1391	3199	2834	12.9
Unbleached Sulphate	1647	1730	1544	3376	3147	7.3
Semichemical	331	353	300	684	620	10.3
Groundwood and Thermo-Mechanical	359	364	341	723	689	4.9
TOTAL PULP DIVISION DATA	4163	4390	3783	8553	7703	11.0
Defib. Exploded & Scrngs E	217	217	224	434	467	-7.2
TOTAL WOOD PULP PRODUCTION	4380	4607	4007	8987	8170	10.0

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments R - Revised E - Estimate NC - Not comparable
P - Preliminary (c) - Census Data - Production, last 2 months estimated.

April 30, 1980

	Full Year		INDUSTRY DATA			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1978	1979	January	February	March		
Total Production (API).......¦ ¦...	62055	64904	5679	5373	5775	67307	5.5
Total Seasonally Adjusted....¦ excluding ¦...			5642	5473	5520	66539	4.4
Imports (including Products).¦hard pressed¦..E	9117	9125	771	772	800	9370	0.0
Exports (including Products).¦ board ¦..E	3373	3672	355	329	340	4096	23.3
Apparent Consumption.........¦ ¦...	67799a	70357 Rb	6058	5916	5980	71816c	2.9
Paper Production % Tonnage Capacity...........	93.0s	95.7s	98.0	98.0	97.9	98.1sh	–
Paperboard Production % Tonnage Capacity......	92.8s	94.8s	94.1	95.1	93.1	96.4s	–
			December	January	February		
MARKET WOOD PULP PRODUCTION - Tons (000)........	5165	5723	485	562	514	6455	42.9
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	47228	49717	3874	4390	4163	51318	11.0
WOOD PULP IMPORTS - TONS (000)..................	4025	4324	347	365	328	4159	2.3
WOOD PULP EXPORTS - TONS (000)..................	2599	2935	290	212	269	2989	32.9
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			December	January	February		
Wood Pulp..(k)............................	47947	50127	3875	4356	4117	50839	6.5
Waste Paper....(d)........................	14760	15400	1316	1289	1315	15622	10.0
Other (Census)............................E	778	643	47	51	48	594	-10.8
Total................	63485	66170	5238	5696	5480	67055	7.1
..WOOD PULP - NON PAPER........................E	884	909	75	74	70	862	-5.8
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	77290	79566	6057	6923	6614	81222	6.7
EMPLOYMENT (000)			January	February	March		
Paper and Allied Products..........Total......	700.9	714.1	711.8	710.0	711.0	710.9	1.0
Pulp, Paper and Board Mills........Total.....E	267.0	271.2	272.6	271.2	272.0	271.9	2.6
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products.....................	6.52	7.12	7.48	7.51	7.53	7.51	9.8
Pulp, Paper Mills..........................E	7.44	8.26	8.71	8.71	8.73	8.72	11.0
Paperboard Mills...........................E	7.68	8.38	8.83	8.84	8.85	8.84	10.0
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q4	1980 Q1	1980 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	3.16	4.88	5.23	5.52	6.21	6.01y	23.2
INDEX OF OUTPUT PER MAN-HOUR (1967=100).........			November	December	January		
¦IN PULP, PAPER ¦...Production Workers.......RS	153.9	159.4	163.3	168.4	169.7	169.7	7.9
¦AND BOARD MILLS¦...All Employees............RS	148.4	153.6	157.3	161.9	162.9	162.9	8.3
PAPER AND ALLIED PRODUCTS (Million $)			December	January	February		
Industry Shipments (Dept. of Commerce)*.......	57654	66033	5492	6014	5796	70860	15.0
Pulp, Paper and Paperboard*.................	25343	30165	2623	2697	2793	32940	20.3
Inventories (End of Period) - Total Industry*.	5875	6779	6779	6842	7112	7112	20.5
Pulp, Paper and Paperboard*................	2006	2321	2321	2355	2423	2423	21.9
	1977	1978	1979 Q2	1979 Q3	1979 Q4		
Sales (Corporations Only, FTC)................	45750	48982	13828	14133	14401	55359	13.0
Earnings (Corporations Only, FTC).............	2367	2598	917	1162	778	3724	43.3
Depreciation (Corporations Only, FTC).........	1663	1726	479	481	489	1896	9.8
Net Worth (Corporations Only, FTC)............	19704	20794	21808	22688	23206	23206	11.6
PRICE INDEXES (Bureau of Labor Stats)1967=100			January	February	March		
Total Pulp, Paper and Allied Products.........	195.6	219.0	237.4	238.9	241.6	239.3	14.3
Wood Pulp.....................................	266.5	314.5	358.8	358.5	359.0	358.8	22.7
Waste Paper...................................	191.2	206.6	222.7	223.2	224.9	223.6	13.7
Paper...	206.1	229.6	245.5	247.5	250.5	247.8	12.2
Paperboard....................................	179.6	202.1	221.8	223.4	225.9	223.7	17.4
PAPER DEMAND (INDEXED: 1967=100)			January	February	March		
Total Paper Production *......................	135.3	142.4	150.9	147.2	146.9	148.4	8.2
Paper New Supply *..........................	132.9	137.9	143.7	140.9	140.8	141.8	4.9
Total End - Use Index *....................	139.5	144.5	146.5	146.9	146.4	146.6	1.5
Production of Nondurable Goods *...(19%)..	157.0	163.3	165.8	165.3	164.3	165.1	2.0
Disposable Income (Constant $) *...(23%)..	145.2	148.5	149.6	148.9	148.3	148.9	0.1
Total Printing and Publishing *...(58%)..	131.5	136.8	138.9	140.0	139.7	139.5	1.8
Trend Factor	----------	----------	----------	--Not Available--	----------	----------	----------
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production *................	132.8	138.8	144.0	138.7	141.5	141.4	2.8
Production for Domestic Use	131.1	136.7	139.8	135.4	137.6	137.6	1.0
Total End - Use Index *../..................	147.7	151.6	151.0	151.1	150.1	150.7	-1.0
Production of Consumer Goods *...(60.49%)	149.1	150.3	148.5	149.3	148.1	148.6	-2.0
Production of Equipment *...(6.62%)	132.8	142.1	145.7	146.0	145.9	145.9	3.7
Production of Materials *...(32.89%)	148.3	156.0	156.7	155.5	154.5	155.6	0.0
Trend Factor	----------	----------	----------	--Not Available--	----------	----------	----------
NEWSPRINT MARKETS			December	January	February		
Consumption by Publishers - Tons (000)........	10872	11240	974	870	874	10463	2.3
Newspaper Pub. and Printing Emp. Total (000)..	407.4	420.7	429.4	428.4	429.5	429.0	3.5
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	115090	118960	10245	7434	8496	95580	4.5
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	17586	19721	1643	1937	1777	21684	19.8
Inventories (End of Period)	1482	1695	1695	1670	1691	1691	15.2
Paper Only...............................Sales	13078	14788	1218	1330	1303	15798	18.0
Inventories (End of Period)	1025	1141	1141	1137	1155	1155	14.4
RETAIL TRADE (Million $)			January	February	March		
Total Retail Sales *..........................	799054	884107	79464	78209	77223	939584	9.5
Nondurable Goods Stores Sales *..............	518190	576882	52196	51625	51667	621952	12.7
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)*.	146.1	152.1	152.7	152.4	151.2	152.1	-0.0
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	209.3	235.5	254.7	259.8	261.5	258.7	15.6
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	195.4	217.4	233.2	236.4	239.8	236.5	14.3
			December	January	February		
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	275.6	311.3	311.3	309.0	308.7	308.7	11.8
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1979 Q3	1979 Q4	1980 Q1		
G.N.P. or Expenditure - Current $.............	2127.6	2368.8	2396.5	2456.9	2520.3	2520.3	10.0
G.N.P. OR Expenditure - 1972 $................	1399.2	1431.6	1433.3	1440.3	1444.2	1444.2	1.0

lb/capita	Popul.(mil)
.a - 621	218.5
.b - 638	220.4
.c - 648	221.7

.d - 1977 - 12103; 1978 - 12481
, 1979 12,956
, (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrnds. Prod. was: 1978 - 3,140; 1979 - 3,017; 1980 A.R.Y-T-D 2,604 (000 tons)
s - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '78 - 1,666; '79 - 1,593 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
* - Seasonally adjusted

A2500-2A

MONTHLY STATISTICAL SUMMARY

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Vol. 58 MAY 1980 No. 5

Production Rates Easing Downward

Production of paper and paperboard in April was about 5.4 million tons, roughly equal to the April 1979 total. On a seasonally adjusted basis the April 1980 production was at a rate of about 63-½ million tons per year, 4-½% below the record high of 66.6 million tons per year achieved in the first quarter of 1980.

Paper production in April maintained a stronger trend than did paperboard. The seasonally adjusted rate of paper production in April was only about 2% below its first quarter high; paperboard production fell off by about 6-½%. Moreover, the weekly rate of paperboard production in the first six weeks of the current quarter was somewhat erratic. In the last week of April the weekly production was reported at 645,000 tons, which was a record high total, while three weeks earlier, production was 13% below that level. The trend in paper production has been more stable, fluctuating in a range of from 594,000 tons to 612,000 tons per week.

Weekly data on orders for printing and writing papers showed that the backlog of uncoated free sheet orders has been moving downward since the beginning of March. Shipments held to fairly high levels, while new orders did not start to ease until early April. As of the end of April, the rate of new orders was about equal to its 1979 average.

Continued on Page 2

Continued from Page 1

The uncoated groundwood paper unfilled order backlog, by way of contrast, held steady through the middle of April, and only started downward toward the end of the month. New orders were fairly erratic during the first quarter of the year but did fluctuate around a fairly high level. As of the end of April they too, were close to their 1979 average.

Production of paperboard, however, which had been at record high levels in the first quarter of the year, fell off more sharply in April. As has often been the case, the solid wood pulp grades - bleached and unbleached kraft plus semichemical paperboards - were relatively stronger than the recycled grades. The rate of solid wood pulp paperboard production in April was 3-½% below its first quarter level, while recycled paperboard showed an 11-½% decline. The weakness evident in solid wood pulp paperboard grades reflects, to some extent, similar weakness in the demand for corrugated shipping containers. The trend of corrugated shipping containers apparently peaked during the first quarter of 1980 and started to move down in April. The seasonally adjusted rate of fiber box shipments in April was 5% below the average level for the first quarter of 1980, although the average rate of shipments for the first four months of 1980 was close to the average rate for all of 1979.

These trends may be compared with trends in total industrial production. For example, total industrial production in the first quarter of 1980 averaged out very close to its third and fourth quarter 1979 level, but the month-to-month trend during that quarter moved downward. The April 1980 seasonally adjusted rate was 1.5% below its year-ago level and 2.4% below its first quarter 1980 average. However, non-durable consumer goods, which includes most of the major paper and paperboard packaging markets was a shade above its year-ago level in April 1980, but 1.2% below its first quarter 1980 average.

New Supply

Imports and exports of paper, paperboard and products both strengthened significantly in March from their January-February level. Among the import grades, the major gain

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

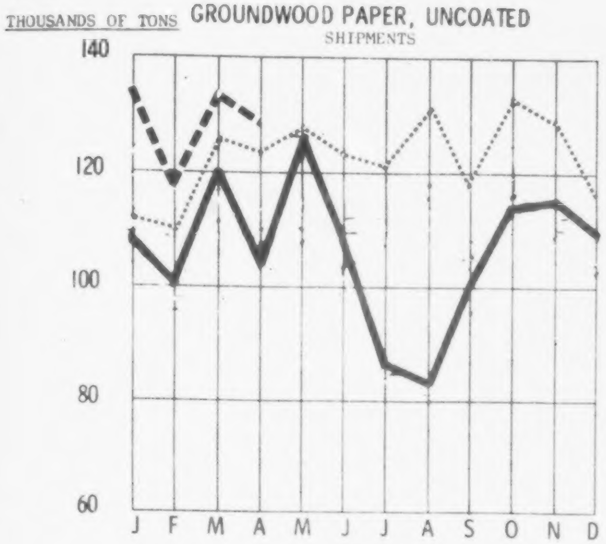
	YEAR		JAN.	FEB.	MARCH	APRIL	Annual Rate Y-T-D	% Change from same Period
	1978	1979	1980	1980	1980	1980	1980	Last Year
PAPER					R	P		
Newsprint - Production	3768	4062	376	368	394	374	4534	17.1
- Shipments	3779	4066	369	367	387	374	4492	15.8
Printing & Writing	14581	15539	1399	1313	1410	1316	16314	7.1
Groundwood Paper - Shipments	1349	1530	135	117	134	129	1543	4.9
- New Orders	1408	1527	169	119	138	118	1631	6.8
- Unfilled Orders	184	188	180	186	185	170	170	-15.9
Coated Paper - Shipments	4448	4525	416	390	415	372	4778	5.7
- New Orders	4428	4535	460	407	373	398	4915	6.9
- Unfilled Orders	404	438	381	426	377	408	408	-7.9
Unctd Free Sheet - Shipments	7225	7868	716	681	728	682	8420	10.4
- New Orders	7542	7805	730	646	686	652	8138	6.2
- Unfilled Orders	754	688	749	791	719	711	711	-3.8
Thin Paper - Production *	350	376	31	29	35	32	384	0.8
Cotton Fiber Paper - Shipments	114	125	12	12	11	11	137	6.6
Bleached Bristols -Production*	1095	1114	89	85	87	90	1054	-4.7
Tissue Paper - Production	4215	4525	384	368	399	375	4576	2.3
Total Packaging & Other Paper	5789	5725	519	495	516	485	6048	7.5
Unbl. Kraft Paper - Shipments	3884	3934	346	335	346	330	4072	4.0
Other Paper - Production * #	1905	1791	173	160	170	155	1976	15.6
TOTAL PAPER-Production-Unadj.	28353	29851	2678	2544	2719	2550	31472	7.8
-Production-S.A.			2618	2577	2575	2535	30913	6.9
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	22790	23947	2081	1959	2123	1995	24471	3.1
Unbl. Kraft Linerboard - Total	13228	14076	1216	1162	1248	1170	14386	4.4
Production for Export	1466	1621	176	147	160	148	1894	25.1
Other Unbl. Kraft Paperboard	1144	1127	98	82	104	91	1127	-8.9
Semichemical Paperboard	4439	4721	422	393	424	408	4937	6.6
Production for Export	119	92	11	12	12	9	130	36.0
Solid Bleached Paperboard	3979	4023	345	321	348	326	4021	-1.7
Production for Export	430	466	43	47	45	40	525	16.1
Recycled Paperboard	7485	7683	658	628	668	584	7612	-2.2
Production for Export	22	22	2	2	4	5	40	98.8
TOTAL PAPERBOARD-Prod.-Unadj.	30275	31631	2738	2586	2790	2579	32083	1.8
- Containerboard Prod.(Dom. Use)	17908	19031	1606	1549	1669	1576	19199	3.0
- Boxboard Production (Dom. Use)	6505	5897	516	470	511	469	5896	-3.3
- All Other P'bd Prod.(Dom. Use)	3825	4503	386	358	389	333	4399	-5.7
- Total Paperbd Prod. for Export	2037	2200	231	209	222	201	2590	24.4
TOTAL PAPERBOARD PROD. - S.A.			2738	2637	2691	2514	31739	1.0
WET MACHINE BOARD *	136	144	14	12	14	13	158	23.0
BUILDING PAPERS *	1915	1900	141	145	150	145	1744	-8.2
INSULATING BOARD *	1416	1422	96	100	110	110	1248	-13.0
TOTAL ALL GRADES - Unadjusted	62095	64947	5667	5387	5783	5397	66704	3.9
- Production - S.A.			5631	5488	5528	5302	65846	3.0
HARD PRESSED BD. [not in total]*	2294	2123	158	158	170	175	1982	-4.7

*	Census Data - Production. Last two months estimated.	S.A.	Seasonally Adjusted
#	Production excludes API bleached kraft envelope.	P	Preliminary
##	Includes revisions not available monthly.	R	Revised

### Data for unbleached kraft folding boxboard for 1979 and 1980 included in All Other.

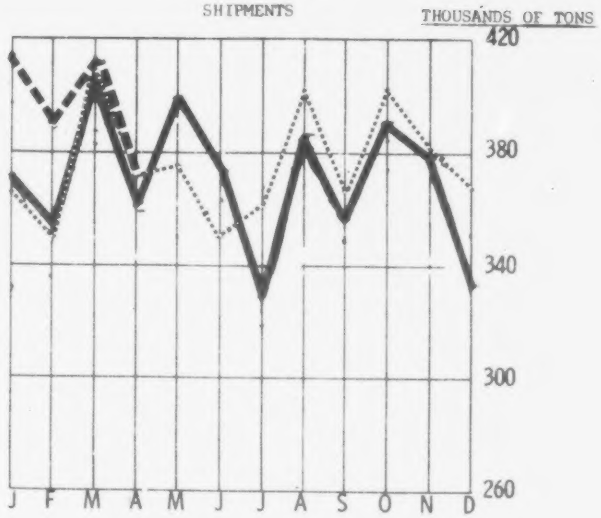
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



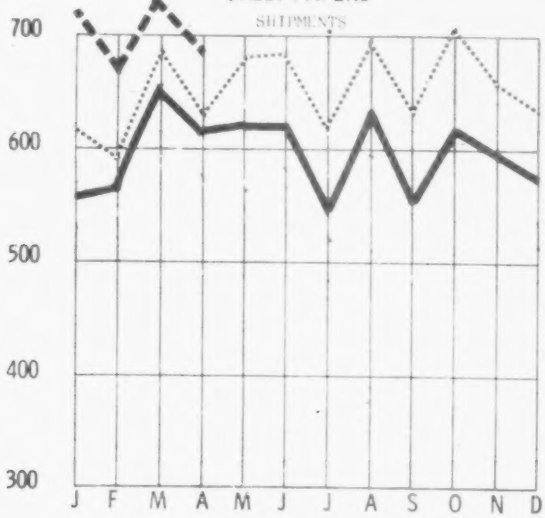
COATED PAPER

SHIPMENTS



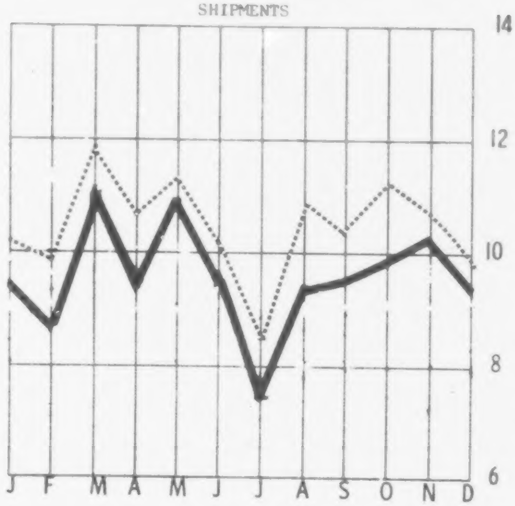
UNCOATED FREE SHEET PAPERS

SHIPMENTS



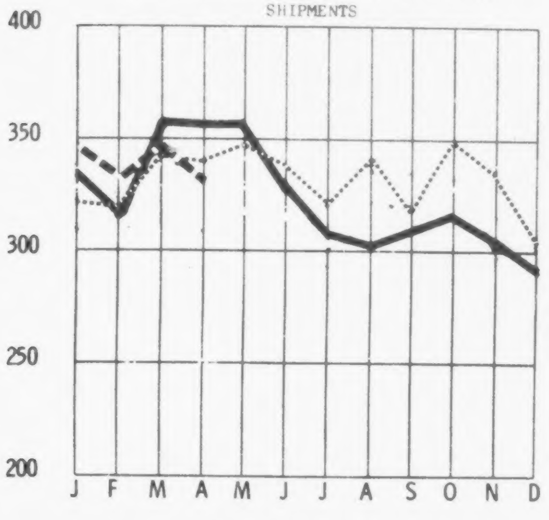
COTTON FIBER PAPER

SHIPMENTS



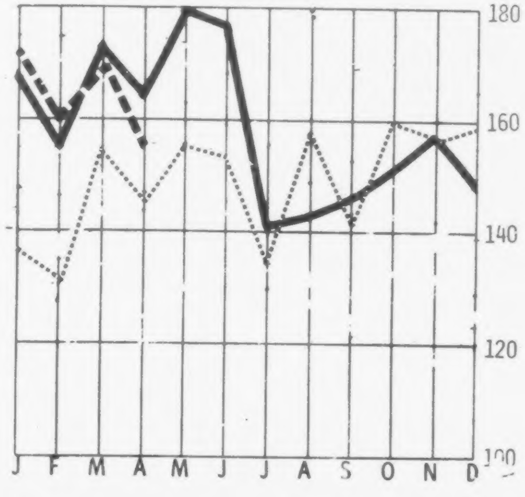
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

WOOD PULP STATISTICS
(Thousands of Tons)

		YEAR 1978	YEAR 1979	DEC. 1979	JAN. 1980	FEB. 1980	MARCH 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
TOTAL WOOD PULP (1)						R	P		
Total Wood Pulp	- Production	47228	49743	3885	4391	4153	4496	52157	8.6
	- Imports	4025	4324	347	365	328	445	4553	6.6
	- Exports	2599	2935	290	212	269	321	3209	39.4
	- New Supply	48653	51133	3942	4543	4212	4621	53501	7.0
Dissolving Pulp	- Production	1411	1497	118	146	125	134	1616	27.5
	- Imports	189	193	22	25	21	21	269	14.7
	- Exports	758	764	75	43	54	91	753	18.2
	- New Supply	842	926	64	128	92	63	1131	30.9
Paper Grades Chemical Pulp	- Production	37893	39785	3099	3528	3337	3604	41877	8.5
	- Imports	3627	3930	311	325	301	396	4087	6.2
	- Exports	1780	2100	209	160	210	220	2357	44.9
	- New Supply	39740	41614	3201	3694	3428	3780	43606	6.9
Groundwood and Thermo-Mech.	- Production	4141	4394	359	364	359	394	4466	3.7
	- Imports	208	201	14	15	6	28	197	3.8
	- Exports	62	70	6	10	5	10	98	163.2
	- New Supply	4287	4525	367	369	360	413	4565	2.4
Semi-Chemical	- Production	3783	4068	310	353	332	365	4198	8.7
	- Imports	0	0						
	- Exports	0	0	------	Included	with	Groundwood	Pulp ------	
	- New Supply	3783	4068	310	353	332	365	4198	8.7
MARKET WOOD PULP									
Total Market Wood Pulp	- Production	5126	5667	481	556	511	544	6444	32.3
	- Imports	2816	3046	233	276	238	300	3260	3.5
	- Exports	2480	2784	262	219	272	301	3168	41.0
	- New Supply	5462	5930	451	613	477	543	6536	13.2
Dissolving Pulp	- Production	1406	1497	117	145	124	134	1613	26.4
	- Imports	291	306	16	17	16	17	197	-51.6
	- Exports	824	869	86	56	66	97	876	28.2
	New Supply	873	934	48	106	74	53	935	-6.6
Paper Grades Chemical Pulp	- Production	3644	4107	357	404	378	403	4742	32.7
	- Imports	2495	2734	217	259	221	279	3037	11.0
	- Exports	1613	1870	173	155	200	202	2227	45.3
	- New Supply	4525	4971	401	508	400	480	5552	16.3
Groundwood Pulp and All Other	- Production	76	64	7	6	8	8	88	309.3
	- Imports	26	7	0	1	1	5	26	282.4
	- Exports	42	46	4	8	6	3	66	107.6
	- New Supply	59	25	3	0	3	10	49	-1625.0

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1978 - 3,140; 1979 - 3,018; A.R.Y-T-D'80 - 2,7(4
SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

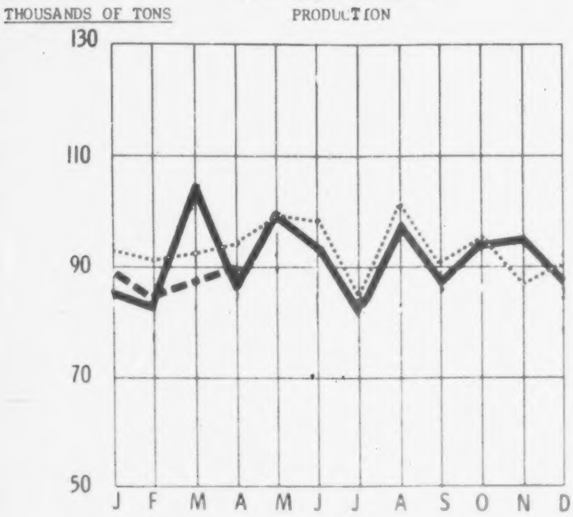
FIBROUS RAW MATERIALS
(Thousands of tons)

	YEAR 1978	YEAR 1979	DEC. 1979	JAN. 1980	FEB. 1980	MARCH 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	63449	66199	5360	5733	5398	5882	68053	5.4
Total Wood Pulp (2) A	47911	50156	3885	4357	4100	4545	52006	5.8
Market Wood Pulp A	4774	5031	401	441	418	440	5194	1.0
Waste Paper (3) A	14760	15400	1427	1324	1246	1286	15423	4.8
Rags, Straw & Other C, E	778	643	47	53	51	52	624	-9.3
INVENTORIES								
Wood Pulp at Pulp Mills A	130	107	107	105	109	115	115	-11.6
Market Pulp at Pulp Mills A	187	132	132	160	140	143	143	-11.6
Mkt Pulp at Ppr.& Bd. Mills CE	435	426	426	418	418	400	400	3.4
Waste Ppr.at Ppr.&Bd. Mills (4)	740	798	798	905	818	756	756	-2.8
Rags, Straw and Other at Paper and Board Mills C, E	66	61	61	57	56	55	55	-14.1
Mkt Wood Pulp Days of Supply A	44	38	38	38	36	36	36	-0.7
Wood Pulp Consumption at at Non-Paper Mills C, E	884	909	75	74	70	72	864	-6.9

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.(000 tons): 1978 - 1,666; 1979 - 1,593
(3) Census Waste Paper Consumption, (000 tons): 1978 - 12,481; 1979 - 12,962; Jan-Feb '80 A.R. - 12,666
(4) Census data prior to 1979; more recent data are from the Paper Stock Conservation Committee, A.P.I.

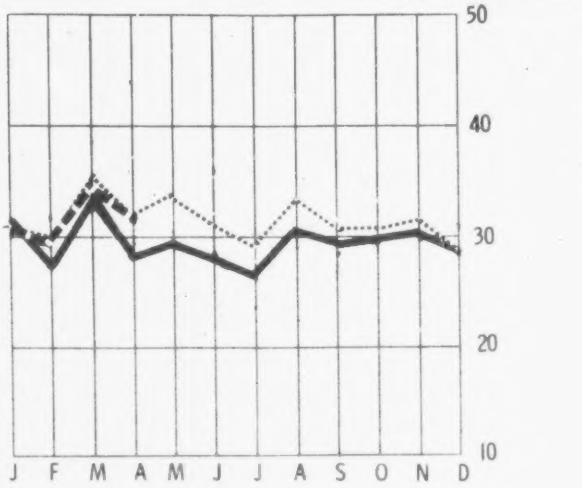
BLEACHED BRISTOLS

PRODUCTION



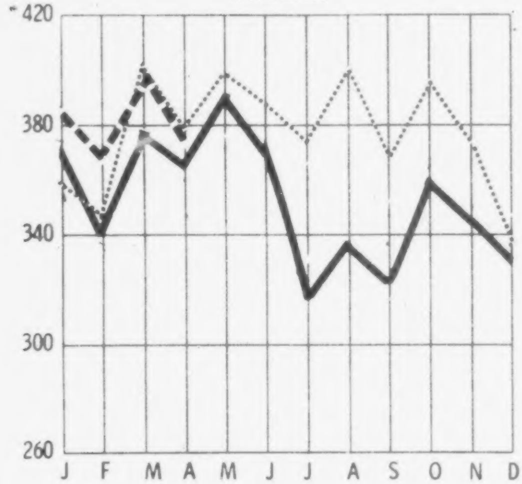
THIN PAPERS

PRODUCTION



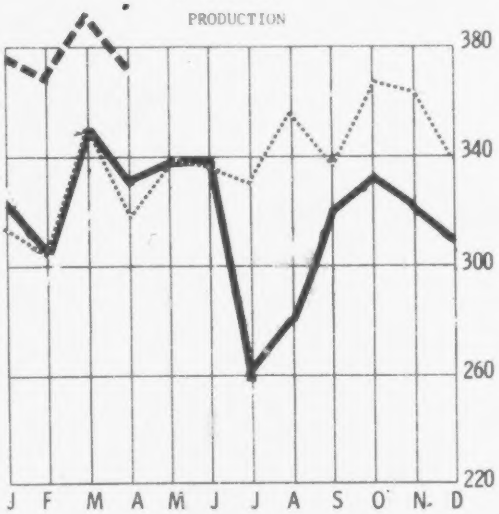
TISSUE PAPER

PRODUCTION



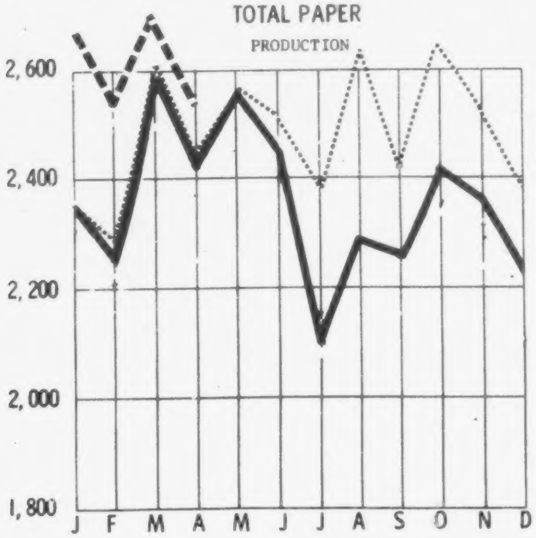
NEWSPRINT

PRODUCTION



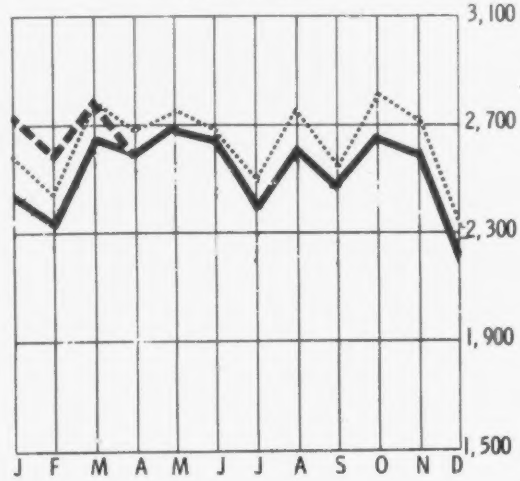
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1978	YEAR 1979	DEC. 1979	JAN. 1980	FEB. 1980	MARCH 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	77025	78625	6479	6906	6996	6895	83188	13.2
	- Total Consumpt.	77290	79566	6057	6923	6614	7044	82324	4.9
	- Residues *	30369	30015	2150	2415	2353	2491	29036	2.2
	- Inventories	6244	5506	5506	5320	5677	5555	5555	8.8
So. Atlantic	- Total Receipts	25353	26126	2103	2248	2195	2209	26608	5.7
	- Total Consumpt	25204	26523	1934	2320	2235	2388	27772	6.2
	- Residues *	8513	8858	673	730	694	760	8736	-0.2
	- Inventories	1191	1052	1052	997	987	823	823	-16.7
Northeast	- Total Receipts	6664	7461	618	735	837	566	8952	18.9
	- Total Consumpt	6607	7584	595	680	635	682	7988	2.4
	- Residues *	1662	1670	113	119	153	146	1672	0.2
	- Inventories	770	674	674	667	862	965	965	16.7
South Central	- Total Receipts	25572	26654	2225	2281	2193	2202	26704	5.6
	- Total Consumpt	25678	26432	1999	2275	2171	2289	26940	0.6
	- Residues *	8418	8669	616	737	644	662	8172	-7.8
	- Inventories	1194	1472	1472	1485	1495	1400	1400	53.3
North Central	- Total Receipts	5291	5630	569	612	656	558	7304	39.6
	- Total Consumpt	5330	5535	430	459	446	449	5416	-5.8
	- Residues *	1456	1501	117	129	122	112	1452	8.4
	- Inventories	968	993	993	1119	1317	1436	1436	65.8
West	- Total Receipts	14145	12754	964	1030	1115	1260	13620	32.8
	- Total Consumpt	14471	13492	1099	1189	1127	1236	14208	18.6
	- Residues *	10320	9317	631	700	740	811	9004	15.5
	- Inventories	2121	1315	1315	1052	1016	1031	1031	-35.5

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1979 Tons	YEAR 1979 $000	FEB. 1980 Tons	FEB. 1980 $000	MARCH 1980 Tons	MARCH 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206050	8867	10445	413	26832	1161	260992	29.9
Pulpwood Chips	1527734	30440	107012	2594	171262	4183	1600916	22.2
Wood Pulp, Total	4143944	1404354	325339	129445	414810	163372	4314428	4.8
Waste Fibrous Materials, Total	88344	13727	6137	1023	6513	1015	69548	-11.9
Paper,Paperboard&Products,Total	8501965	2779223	722768	254706	788245	279896	8960726	1.8
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8457803	2725085	718664	248788	784240	273687	8913256	1.8
Paper, Total	8015574	2642945	664736	238846	733262	263870	8309412	-0.4
Newsprint	7077209	2249470	600513	208682	676375	236234	7550724	1.2
Printing,Writing & Rel.Pap.	799355	322818	55632	25009	46149	21480	650486	-13.4
Pack. & Ind. Conv. Paper	118815	57854	7714	4540	10163	5754	100074	-17.6
Special Industrial Paper	3157	3324	170	239	93	123	1170	-37.2
Tissue Paper	17039	9479	707	376	482	280	6958	-51.0
Paperboard, Total	80636	17653	9900	2577	9295	2432	111931	49.9
Wet Machine Board	1522	703	112	54	232	123	1702	17.8
Construction Paper and Bd. *	360071	63784	43917	7312	41451	7263	490212	46.9
Convtd Paper&Paperbd Products	44163	54138	4104	5918	4005	6210	47469	6.7

EXPORTS TO CANADA

	YEAR 1979 Tons	YEAR 1979 $000	FEB. 1980 Tons	FEB. 1980 $000	MARCH 1980 Tons	MARCH 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	263367	11446	10041	382	18732	663	161000	-69.5
Pulpwood Chips	87790	3790	2061	54	3371	90	28376	-69.0
Wood Pulp, Total	136641	49608	13576	4011	21602	5355	176984	32.2
Cotton Pulp & Other Pulp	7921	3728	1403	417	1292	424	14312	88.7
Waste Paper	478477	50207	49261	4589	51940	5059	555296	53.5
Paper,Paperboard&Products,Total	624928	353202	56767	31998	56671	34350	650364	5.3
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	454029	248403	42238	21868	38150	22837	471752	3.9
Paper, Total	181451	142407	21395	14471	16562	15058	221840	22.5
Newsprint	2803	1734	206	203	129	154	1793	-59.2
Printing,Writing & Rel.Pap.	108290	76567	9777	7467	9647	7513	116565	11.8
Pack. & Ind. Conv. Paper	16084	10108	2033	1103	847	697	16094	-5.4
Special Industrial Paper	46773	48173	9005	5345	5264	6126	82496	81.0
Tissue	7502	5825	374	353	675	569	4891	-50.7
Paperboard, Total	230904	83021	17457	6241	18300	6594	214339	-3.9
Wet Machine Board	5262	9916	266	141	252	148	3176	-43.7
Construction Pap. & Bd. E *	36411	13059	3120	1015	3037	1037	32398	-26.6
Convtd Paper&Paperbd Products	170900	104799	14529	10130	18521	11513	178612	9.0

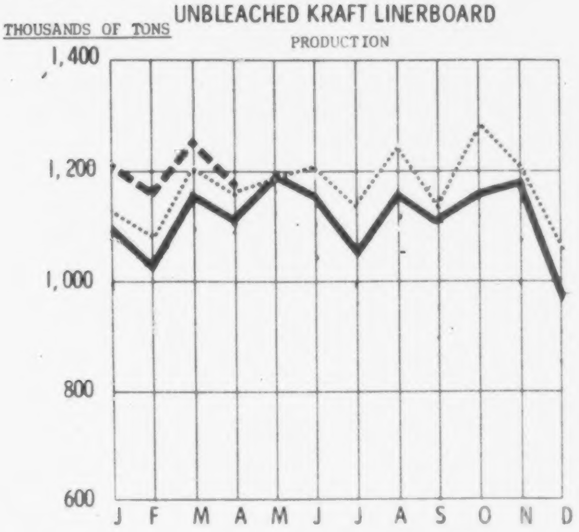
* - Hard Pressed Board (not in total)

Imports of Hard Pressed Bd.	29771	5370	3568	697	5422	1043	43364	195.8
Exports of Hard Pressed Bd.	20535	6878	1218	456	2001	678	19932	-22.2

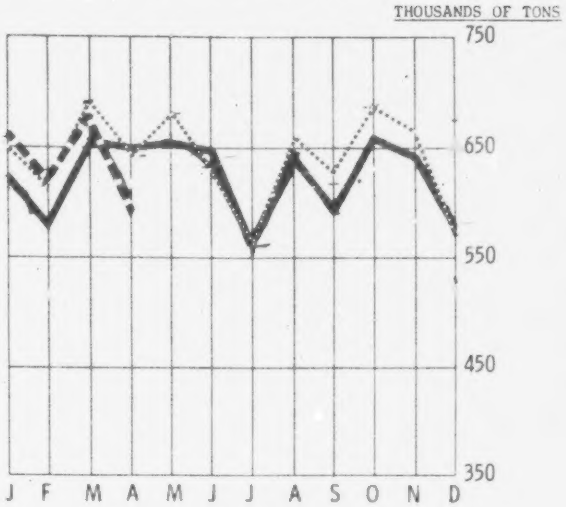
SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

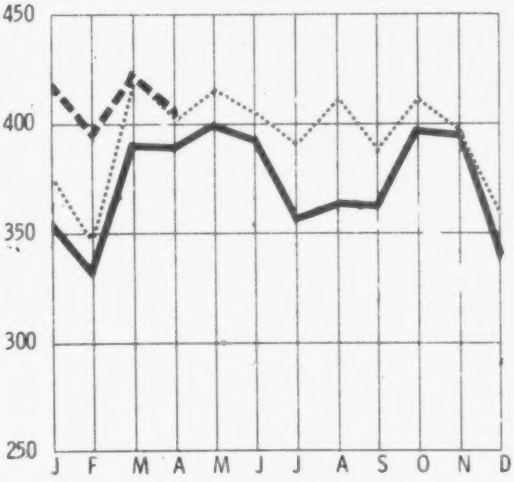


RECYCLED PAPERBOARD



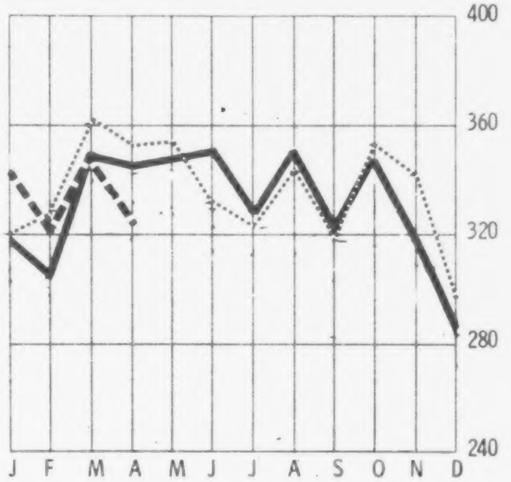
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



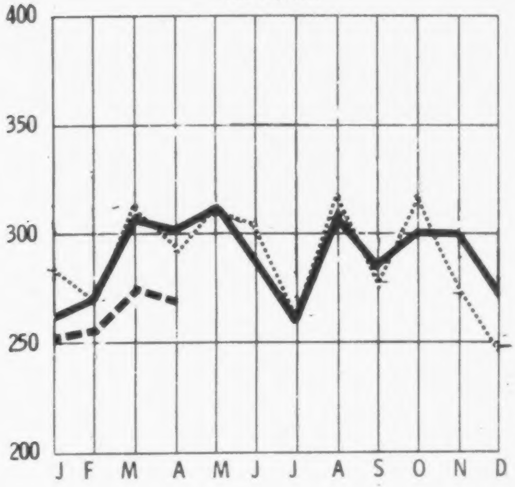
SOLID BLEACHED PAPERBOARD

PRODUCTION



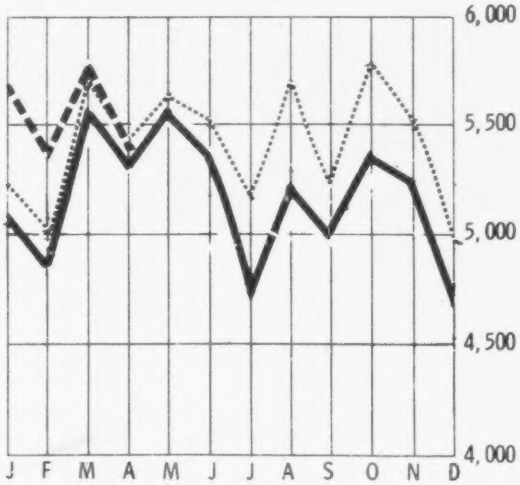
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1978 ▬▬ 1979 ┈┈┈ 1980 ▬ ▬ ▬

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1979 Tons	YEAR 1979 $000	FEB. 1980 Tons	FEB. 1980 $000	MARCH 1980 Tons	MARCH 1980 $000	(1) Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206074	8869	10445	413	26832	1161	260992	29.9
Pulpwood Chips	1574763	33413	107012	2594	171262	4183	1600916	17.6
Total All Imports	13554749	4693607	1107382	422900	1282443	482144	14123138	2.7
Wood Pulp, Total	4324033	1465169	328147	130628	444965	173665	4552676	6.6
Waste Paper	62310	8625	2534	276	3069	279	32376	-37.9
Other Fibrous Materials	43640	13149	4685	1447	4523	1608	47141	-11.9
Paper, Paperbd & Products, Total	9124767	3206665	772016	290548	829886	306592	9490945	1.3
Paper, Paperboard, Wet Machine Bd. & Construction Paper & Board	9028643	2983554	764312	271964	823910	292510	9403271	1.3
Paper, Total	8561213	2894764	708160	261531	770123	282094	8770738	-0.9
Newsprint	7224195	2300450	623609	219653	684885	239498	7710608	2.1
Printing & Writing	1176253	510579	75265	36000	73659	35492	941837	-16.5
Uncoated Groundwood	804598	295996	49900	20879	45812	18990	625256	-18.6
Uncoated Book	142674	69291	9078	4751	10544	5364	119308	-10.0
Coated Print. & Impres. Pap	188846	108590	12981	7652	15490	8852	165551	-14.6
Bristols	2247	1243	512	248	116	79	2669	189.5
Writing and Similar Paper	22964	23403	1876	1546	1106	1107	20048	-12.7
Thin (except Cigarette)	14924	12057	918	925	592	800	9005	-9.1
Total Pkg & Other Paper	143452	74013	8474	5444	11070	6809	110799	-28.3
Unbleached Kraft Paper	66816	23211	2788	1222	4116	1679	39648	-46.6
Other Pkg. & Indust. Paper	76636	50802	5686	4222	6954	5131	71152	-11.5
Tissue	17312	9722	812	435	509	295	7494	-48.8
Paperboard, Total	82203	19111	9946	2660	9135	2599	112954	49.4
Test or Containerboard	25725	6021	4064	1074	4418	1269	53850	117.4
Semi-Chemical Corrugating	33494	5889	2870	560	2970	593	35174	-0.0
Other Paperboard	22984	7201	3012	1026	2017	737	23930	53.1
Wet Machine Board	2345	1341	215	137	249	136	2516	5.8
Construction Paper & Bd. *	382883	68338	45990	7637	44103	7682	517063	46.6
Building Paper	330147	56768	42387	6839	40242	6804	470780	54.4
Insulating Board	21682	4664	1780	425	1394	321	18635	-25.3
Other Building Board	31054	6906	1824	373	2477	558	27649	20.5
Convtd Paper & Paperbd Products	96124	223111	7704	18584	5976	14082	87674	-0.0
Paper Products, Total	90317	211663	7235	17721	5541	13057	82252	-0.8
Paperboard Products, Total	5807	11447	470	863	434	1025	5422	13.4
Notes								
Other: No Weight Avail. ($000)		81899		5240		6144	68762	-5.2
Total Imports Incl. Other ($000)		4775506		428140		488288	5439584	20.6

EXPORTS

							(1)	
Pulpwood, Roundwood (in cords of 128 cu. ft.)	263721	11473	10309	388	21560	726	188208	-64.3
Pulpwood Chips	4498674	197847	422841	25542	265850	19397	3988712	3.9
Total All Exports	8971708	3348409	848758	315907	963560	370914	10478899	35.7
Wood Pulp, Total	2934815	1103783	269173	108356	320633	131930	3208804	39.4
Cotton Pulp and Other Pulp	131444	74579	11494	5911	14599	7770	163956	42.1
Waste and Old Paper	2233246	256107	239221	25071	257064	29058	2885184	45.4
Paper, Paperbd & Products, Total	3672203	1913940	328870	176570	371264	202156	4220955	27.0
Paper, Paperboard, Wet Machine Bd. & Construction Paper & Board	3109859	1328320	279425	124757	312674	142037	3595857	29.4
Paper, Total	600876	507568	56515	48915	58107	51206	724240	34.4
Newsprint	71456	32046	4190	2036	4445	2051	84192	28.3
Printing & Writing	274608	233371	22880	22352	24234	22121	281166	12.2
Uncoated Groundwood	80392	55384	4342	4026	7495	5207	71185	-3.5
Clay Coated Paper	73521	57743	7357	6480	6020	5069	80139	20.4
Uncoated Free Sheet	68159	64146	4972	5919	5428	6099	66422	6.7
Other Printing & Writing	52536	56098	6210	5927	5292	5746	63419	31.8
Total Pkg. & Other Paper	226906	218218	26441	21816	24249	22477	319790	60.7
Unbleached Kraft	63695	27079	9313	3979	11280	4528	133628	141.7
Other Pkg. & Indust. Paper	163211	191138	17128	17837	12969	17950	186163	29.6
Tissue	27905	23934	3004	2712	5179	4557	39091	65.4
Paperboard, Total	2446972	789902	217003	73834	248985	88638	2807192	29.2
Solid Wood Pulp	2271161	712276	205870	68779	228056	81346	2628738	31.5
Total Linerboard	1644901	434515	146780	42886	151063	46443	1852010	23.8
Bleached Kraft Linerboard	179995	51186	12321	3198	20405	7009	192787	2.8
Unbleached Kraft Linerbd	1464906	383330	134458	39688	130658	39434	1659222	26.8
Other Unbleached Kraft	100301	33739	14896	5281	19733	6580	174665	108.3
Other Bleached Kraft	508601	238813	42454	20111	56291	27960	587554	43.6
Semi-Chemical Corrugating	17358	5208	1740	501	970	364	14509	56.7
Recycled Paperboard	175811	77626	11134	5055	20930	7291	178454	2.8
Wet Machine Board	7371	5146	536	270	547	322	6353	-21.5
Construction Paper & Bd. *	54642	25704	5370	1738	5035	1871	58072	-4.4
Building Paper	34020	14420	2613	701	2071	708	29203	-25.2
Insulating Board E	20623	11284	2757	1037	2964	1162	28869	33.2
Convtd Paper & Paperbd Products	562343	585620	49445	51813	58589	60119	625098	15.1
Paper Products, Total	332256	427080	30176	37947	33660	41105	371061	20.5
Paperboard Products, Total	230087	158540	19269	13866	24930	19015	251037	8.0
Notes								
Other: No Weight Avail. ($000)		9803		868		966	11854	25.2
Total Exports Incl. Other ($000)		3358212		316775		371879	3977362	43.8

* Hard Pressed Board (not in total)

Imports of Hard Pressed Board	260775	39528	16699	2891	16511	3052	200388	-14.2
Exports of Hard Pressed Board	32030	11223	1397	561	3198	1064	28080	-12.6

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1978	YEAR 1979	NOV. 1979	DEC. 1979	JAN. 1980	FEB. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint	3489	3797	351	323	388	374	4574	30.4
Uncoated Groundwood Papers	1569	1674	142	135	122	112	1402	-14.7
Coated Papers	4513	4675	400	388	423	379	4811	10.5
Uncoated Free Sheet (1)	7315	7508	646	614	689	644	7999	12.3
Cotton Fiber Paper (1)	119	127	11	10	12	12	148	18.8
Thin Papers	350	376	31	28	31	29	365	0.3
Bleached Bristols	1127	1114	86	90	97	97	1160	5.3
Tissue Paper	4245	4310	355	328	377	351	4369	8.5
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3873	3923	355	304	342	346	4132	13.5
Other Paper (1)	1905	1791	157	159	173	160	2002	24.2
TOTAL PAPER GRADES	28505	29295	2534	2378	2656	2505	30962	12.6
PAPERBOARD								
Solid Wood Pulp Furnish	22500	22833	1982	1765	2040	1922	23771	12.2
Unbleached Kraft Linerboard	13215	13685	1160	1039	1195	1134	13972	7.9
Other Unbl. Kraft Paperboard	898	1014	90	61	92	84	1054	12.7
Bleached Kraft Paperboard	4002	3934	356	311	349	327	4058	17.6
Semi-Chemical Paperboard	4384	4200	376	354	405	377	4688	21.7
Recycled Paperboard	7534	7240	624	594	645	631	7657	8.4
TOTAL PAPERBOARD GRADES	30034	30073	2606	2358	2685	2553	31429	11.2
WET MACHINE BOARD	136	144	14	16	14	12	153	26.9
CONSTR. PAPER & INSUL. BOARD	3332	3322	265	230	237	245	2894	-9.3
TOTAL ALL GRADES [Excl. H.P.B.]*	62006	62834	5419	4983	5591	5315	65437	10.8

PRODUCER PRICE INDEXES

1967 = 100

	1978	1979	JAN.	FEB.	MARCH	APRIL		
Pulp, Paper and Products	195.6	219.0	237.4	238.9	241.6	246.5	241.1	14.4
Pulp, Paper & Products, except Waste Paper #	195.6	219.2	237.6	239.2	241.9	246.6	241.3	14.5
Total Wood Pulp	266.5	314.3	358.8	358.5	359.0	386.8	365.8	23.9
Total Paper	206.1	229.6	245.5	247.5	250.5	253.6	249.3	12.2
Total Paper, exc. Newsprint	199.4	222.8	238.0	240.3	244.4	248.5	242.8	12.6
Newsprint	226.3	249.9	268.2	269.4	269.4	269.4	269.1	11.6
Total Paperboard	179.6	202.1	221.8	223.4	225.9	230.2	225.3	17.1
Total Paper and Paperboard #	197.8	220.9	238.1	239.9	242.8	246.3	241.8	13.7
Converted Products	186.5	209.9	227.5	228.7	231.3	234.6	230.5	14.1
Waste Paper	191.2	206.6	222.7	223.2	224.9	242.5	228.3	14.6
All Commodities	209.3	235.5	254.7	259.8	261.5	262.3	259.6	15.2
Industrial Commodities	209.4	236.4	260.3	265.4	268.2	270.7	266.2	18.7

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. # Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

was in newsprint, partly induced by expectations of strikes at some Canadian mills. Packaging and industrial converting papers also showed some gain, as did imports of coated papers. However, imports of uncoated groundwood papers continued to move downward.

Among the export grades, the strongest gains were in the paperboard grades, although some gains were also recorded in paper. Exports of bleached boards in March, at 56,000 tons, established a record monthly high. The first quarter bleached board exports rate was about 16% above the average rate for all of 1979.

With production and imports both at very high levels, total new supply (production plus imports less exports) in the first quarter of 1980 was at a rate of 71.9 million tons per year, 2.1% above the 1979 average rate. Total economic activity in that quarter, as measured by real GNP, was 0.8% above its 1979 average level, while total industrial production was slightly below it. It therefore appears that the new supply of total paper and paperboard outpaced the trends of the total economy, suggesting an increase in inventories of paper and paperboard in that period. The drop in production in April, as shown by the preliminary data, brought the estimated new supply down about 4% from the first quarter 1980 rate, which was a little steeper than declines in either total industrial production or in the production of non-durable goods.

Capital Expenditures

The declining trends in economic activity appear to have had some impact on the paper industry's capital expenditure plans. The Economics Department of McGraw-Hill Company, in a recent report, noted that capital expenditures by paper and pulp companies in 1980 would amount to $5.76 billion, 18% above the $4.88 billion spent in 1979. Earlier estimates published by the Department of Commerce indicated that these expenditures would amount to $6.01 billion in

Continued on Page 12

Continued from Page 11

1980, for a 23% gain. There are indications that these changes reflect postponements rather than cancellations. McGraw-Hill also indicated that paper industry capital expenditures in 1981 would hold at the $5.7 billion level, and that present plans indicate only a small decline in these expenditures for 1982. These projections are based upon a survey of company plans reported to McGraw-Hill by the paper industry. In a period of rapid changes in the economy such as the present one, these plans can be altered quickly.

This study was based upon pulp and paper companies that account for about 38% of the total capital expenditures of the industry.

In a separate report McGraw-Hill Company showed that the paper industry's expenditures on pollution control equipment would increase 23% in 1980, to $473 million, and average about $500 million per year in the 1981-1983 period. In an earlier report the Department of Commerce indicated that paper companies would not increase their expenditures for pollution abatement equipment in 1980 from the 1979 level of about $300 million. The 1979-1980 levels are about 25% over the $239 million spent in 1978. The Department of Commerce's 1979 total is about equal to that reported by the National Council of the Paper Industry for Air and Stream Improvement. The estimates of future spending reflect uncertainties resulting from the slow and ever-changing regulatory processes. The industry still awaits final regulations on the 1984 water standards.

McGraw-Hill also reported that expenditures on research and development in 1980 would rise 9%, to $409 million and move up another 15%, to $472 million, by 1983.

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

May 28, 1980

	PRODUCTION (000 TONS)					
	April 1980	March 1980	April 1979	Jan -April 1980	- 1979	% Change 80/79
PAPER GRADES	P	R				
Newsprint	374	394	319	1511	1290	17.1
Uncoated Groundwood (s)	129	134	127	514	491	4.9
Coated Paper (s)	372	415	377	1593	1507	5.7
Uncoated Free Sheet Paper (s)	682	728	636	2807	2541	10.4
Thin Paper (c)	32	35	32	128	127	0.8
Cotton Fiber Paper (s)	11	11	11	46	43	6.6
Bleached Bristols (c)	90	87	94	351	369	-4.7
Tissue Paper	375	399	380	1525	1490	2.3
Unbleached Kraft Packaging & Indl. Converting (s)	330	346	336	1357	1306	4.0
Other Paper (c)	155	170	146	659	570	15.6
TOTAL PAPER	2550	2719	2457	10491	9733	7.8
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1170	1248	1175	4795	4593	4.4
Other Kraft Paperboard	91	104	107	376	412	-8.9
Semichemical Paperboard	408	424	402	1646	1545	6.6
Bleached Paperboard	326	348	353	1340	1363	-1.7
Recycled Paperboard	584	668	645	2537	2594	-2.2
TOTAL PAPERBOARD	2579	2790	2681	10694	10506	1.8
CONSTRUCTION & WET MACH GRADES(c)	268	274	291	1050	1155	-9.1
TOTAL PAPER AND PAPERBOARD	5397	5783	5429	22235	21394	3.9
HARD PRESSED BD.[not in total](c)	175	170	188	661	693	-4.7

WOOD PULP (ALL GRADES)	March 1980	Feb. 1980	March 1979	Jan -March 1980	- 1979	% Change 80/79
Dissolving & Special Alpha	134	125	127	404	317	27.5
Bleached Sulphite	124	122	128	361	287	25.7
Unbleached Sulphite	34	32	33	98	97	1.5
Bleached & Semi-Bl. Sulph.	1676	1535	1541	4861	4375	11.1
Unbleached Sulphate	1771	1648	1740	5148	4887	5.3
Semichemical	365	332	346	1050	966	8.7
Groundwood and Thermo-Mechanical	394	359	388	1117	1077	3.7
TOTAL PULP DIVISION DATA	4496	4153	4303	13039	12006	8.6
Defib. Exploded & Scrngs E	240	216	267	676	734	-7.9
TOTAL WOOD PULP PRODUCTION	4737	4368	4570	13716	12740	7.7

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments   R - Revised   E - Estimate   NC - Not comparable
P - Preliminary   (c) - Census Data - Production, last 2 months estimated.

May 31, 1980

	Full Year		INDUSTRY DATA 1980 R	R	P	Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
PAPER AND PAPERBOARD -- Tons (000)	1978	1979	February	March	April		
Total Production (API).......¦ ¦...	62095	64947	5387	5783	5397	66704	3.9
Total Seasonally Adjusted....¦ excluding ¦...			5488	5528	5302	65846	3.0
Imports (including Products).¦hard pressed¦..E	9117	9125	772	830	790	9488	3.4
Exports (including Products).¦ board ¦..E	3373	3672	329	371	350	4216	29.0
Apparent Consumption.........¦ ¦...	67840 Ra	70400 Rb	5931	5987	5742	71120c	2.0
Paper Production % Tonnage Capacity...........	93.1 Rs	95.8 Rs	98.3	98.3	94.4	96.6sh	-
Paperboard Production % Tonnage Capacity......	92.8 s	94.8 s	95.0	96.2	91.3	94.2s	-
			January	February	March		
MARKET WOOD PULP PRODUCTION - Tons (000)........	5126	5667	556	511	544	6444	32.3
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	47228	49743	4391	4153	4496	52157	8.6
WOOD PULP IMPORTS - TONS (000)..................	4025	4324	365	328	445	4553	6.6
WOOD PULP EXPORTS - TONS (000)..................	2599	2935	212	269	321	3209	39.4
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			January	February	March		
Wood Pulp..(k).............................	47911	50156	4357	4100	4545	52006	5.8
Waste Paper....(d).........................	14760	15400	1324	1246	1286	15423	4.8
Other (Census)..........................E	778	643	53	51	52	624	-9.3
Total................	63449	66199	5733	5398	5882	68053	5.4
..WOOD PULP - NON PAPER........................E	884	909	74	70	72	864	-6.9
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	77290	79566	6923	6614	7044	82324	4.9
EMPLOYMENT (000)			February	March	April		
Paper and Allied Products..........Total......	700.9	714.1	710.0	711.0	708.3	710.3	0.6
Pulp, Paper and Board Mills........Total.....E	267.0	271.2	271.2	271.1	270.0	271.2	2.0
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products......................	6.52	7.12	7.51	7.53	7.60	7.53	9.8
Pulp, Paper Mills..........................E	7.44	8.26	8.72	8.76	8.81	8.75	11.1
Paperboard Mills...........................E	7.68	8.38	8.84	8.85	8.86	8.84	9.4
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q4	1980 Q1	1980 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	3.46	4.88	5.23	5.52	6.21	6.01y	23.2
INDEX OF OUTPUT PER MAN-HOUR (1967=100)..........			December	January	February		
¦IN PULP, PAPER ¦...Production Workers..........	153.9	159.4	168.4	170.5	166.6	168.5	6.2
¦AND BOARD MILLS¦...All Employees...............	148.4	153.6	161.9	163.6	159.9	161.8	6.4
PAPER AND ALLIED PRODUCTS (Million $)			January	February	March		
Industry Shipments (Dept. of Commerce)*........	57654	66033	6014	5864	5829	70828	12.1
Pulp, Paper and Paperboard*.................	25343	30165	2697	2816	2753	33064	16.0
Inventories (End of Period) - Total Industry*.	5875	6779	6842	7104	7325	7325	21.2
Pulp, Paper and Paperboard*.................	2006	2321	2355	2409	2470	2470	20.3
	1977	1978	1979 Q2	1979 Q3	1979 Q4	1979	
Sales (Corporations Only, FTC)..................	45750	48982RS	13828	14133	14401	55359	13.0
Earnings (Corporations Only, FTC)...............	2367	2598RS	917	1162	778	3724	43.3
Depreciation (Corporations Only, FTC)...........	1663	1726RS	479	481	489	1896	9.8
Net Worth (Corporations Only, FTC)..............	19704	20794RS	21808	22688	23206	23206	11.6
PRICE INDEXES (Bureau of Labor Stats)1967=100			February	March	April		
Total Pulp, Paper and Allied Products..........	195.6	219.0	238.9	241.6	246.5	241.1	14.4
Wood Pulp......................................	266.5	314.3	358.5	359.0	386.8	365.8	23.9
Waste Paper....................................	191.2	206.6	223.2	224.9	242.5	228.3	14.6
Paper..	206.1	229.6	247.5	250.5	253.6	249.3	12.2
Paperboard.....................................	179.6	202.1	223.4	225.9	230.2	225.3	17.1
PAPER DEMAND (INDEXED: 1967=100)			February	March	April		
Total Paper Production *......................	135.5	142.6	147.7	147.5	145.2	147.6	6.9
Paper New Supply *............................	132.9	137.9	141.2	143.6	140.3	142.0	5.2
Total End - Use Index *.....................	139.5	144.5	146.8	145.8	144.5	145.9	1.2
Production of Nondurable Goods *...(19%)..	157.0	163.3	165.4	164.0	161.9	164.4	1.5
Disposable Income (Constant $) *...(23%)..	145.2	148.5	148.9	147.9	146.7	148.4	-0.3
Total Printing and Publishing *...(58%)..	131.5	136.8	139.9	139.0	137.9	138.9	1.6
Trend Factor	----------	----------	----------	-Not Available-	----------	----------	----------
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production *................	132.8	138.8	138.6	141.5	132.2	139.1	1.0
Production for Domestic Use	131.1	136.7	135.3	137.6	128.9	135.4	-0.7
Total End - Use Index *.....................	147.7	151.6	150.9	150.1	147.1	149.7	-1.3
Production of Consumer Goods *...(60.49%)	149.1	150.3	149.0	148.1	145.1	147.6	-2.3
Production of Equipment *...(6.62%)	132.8	142.1	145.9	145.7	145.4	145.6	3.6
Production of Materials *...(32.89%)	148.3	156.0	155.5	154.6	151.0	154.5	-0.5
Trend Factor	----------	----------	----------	-Not Available-	----------	----------	----------
NEWSPRINT MARKETS			January	February	March		
Consumption by Publishers - Tons (000)........	10872	11240	870	874	969	10851	1.6
Newspaper Pub. and Printing Emp. Total (000)..	407.4	420.7	428.4	429.3	429.0	428.9	3.4
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	115090	118484	7434	8496	10605	10[illegible]140	7.0
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	17586	19721	1837	1774	1783	21576	14.7
Inventories (End of Period)	1482	1695	1670	1694	1695	1695	9.6
Paper Only.............................Sales	13078	14788	1330	1290	1326	15784	12.6
Inventories (End of Period)	1025	1141	1137	1144	1158	1158	10.0
RETAIL TRADE (Million $)			February	March	April		
Total Retail Sales *........................	799054	884407	77993	76234	75325	927048	8.0
Nondurable Goods Stores Sales *..............	518190	576882	51624	52012	52387	624657	12.9
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)*.	146.1	152.1	152.3	151.3	148.5	151.2	-0.4
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	209.3	235.5	259.8	261.5	262.3	259.6	15.2
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	195.4	217.4	236.4	239.8	242.5	238.0	14.4
			January	February	March		
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	275.6	311.3	309.0	308.2	307.6	307.6	10.4
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1979 Q3	1979 Q4	1980 Q1		
G.N.P. or Expenditure - Current $.............	2127.6	2368.8	2396.5	2456.9	2516.1	2516.1	9.8
G.N.P. OR Expenditure - 1972 $................	1399.2	1431.6	1433.3	1440.3	1442.6	1442.6	0.8

lb/capita	Popul.(mil)
.a - 620	218.7
.b - 638	220.6
.c - 641	221.9

.d - 1977 - 12103; 1978 - 12481
. 1979 12956;Jn-Fb'80A.R.12666
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1978 - 3,140; 1979 - 3,018; 1980 A.R.Y-T-D 2,704 (000 tons)
s - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '78 - 1,666; '79 - 1,593 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
* - Seasonally adjusted

A2500- 2 A

MONTHLY STATISTICAL SUMMARY

AMERICAN PAPER INSTITUTE
260 Madison Avenue New York, N. Y. 10016

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Vol. 58 JUNE 1980 No. 6

Production Continues to Ease

Preliminary data show the seasonally adjusted rate of paper and paperboard production in May 1980 at 62.8 million tons per year. This was 0.9% below the April 1980 rate and 5.4% below the first quarter high of 66.5 million tons.

Paper has been maintaining a somewhat stronger trend than paperboard. The seasonally adjusted rate of paper production in May, for example, was 30 million tons per year, 3.7% below the first quarter rate. Paperboard production, which was also at 30 million tons per year rate, was down 6.7% from the first quarter level. In both grades, however, the decline from April to May was quite moderate.

Within the paper grade structure, newsprint production continued fairly strong in May, with the January-May 1980 total some 16.7% ahead of its year-ago total. This reflected the continued strength in the total demand for newsprint, in part in anticipation of a possible strike in Canada. Most of the increase in demand has been absorbed by domestic producers, imports of newsprint in the January-April period were only 4% above their year-earlier total. The sharp increase in domestic production of newsprint also reflected the new newsprint capacity that came on stream during 1979.

While the rate of production of printing and writing papers has been moving downward during the past few months, the pattern of incoming orders has been fairly erratic.

Continued from Page 1

The trend of uncoated free sheet orders, which had weakened in the late weeks of May, strengthened slightly in the early weeks of June. Shipments have been maintained, to some extent, by reductions in the backlog.

New orders for groundwood papers have also shown an erratic trend. Orders remained above the rate of shipments through the first three months of the year, dropped sharply below them in April and May, and then showed some recovery in the early weeks of June. The pattern of shipments has been relatively strong. Imports of uncoated groundwood papers, however, trended sharply downward from January to April 1980; the four month total was 22% below the corresponding year-ago figure.

Among the packaging grades, unbleached kraft paper shipments, on a seasonally adjusted basis, fluctuated in a fairly narrow range so far this year. However, API data show that shipments of the commodity grades of bleached kraft packaging papers have been in a fairly steep downtrend.

The rate of tissue paper production has also declined, but the five month 1980 total was a half percent above the corresponding 1979 figure.

Although total paper production in the first five months of 1980 was at a record high level, part of this output was diverted to inventories. For example, the reported dollar values of inventories of paper products at paper wholesalers as of the end of April 1980 were 20% above their year-ago total, compared to a 12% increase in merchant sales. As a result, the stock/sales ratio rose from 0.86 in April 1979 to 0.94 in April 1980. Data on inventories of newsprint at newspapers, published by the Canadian Pulp and Paper Association show that as of the end of April 1980, total newsprint stocks amounted to 1.1 million tons, equivalent to 39 days of supply. A year ago that total was 950,000 tons, equivalent to 33 days of supply.

The above figures suggest that on the whole, the increases in inventories were probably close to the amounts required to bring inventories up to normal levels with respect to output. Available data indicated that as of the end of April, inventories of paper and paper products throughout the channels of distribution and use were generally in line with requirements. Some involuntary build-up seems under way at present, but the amount of excess remains relatively small.

The decline in the rate of paperboard production, was concentrated almost entirely in the boxboard grades. Total production of unbleached kraft linerboard in May 1980, at 1.25 million tons, was at a seven month high. The year-to-date total was 5% over the corresponding 1979 level, and 3.4% ahead of the average rate for all of 1979.

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

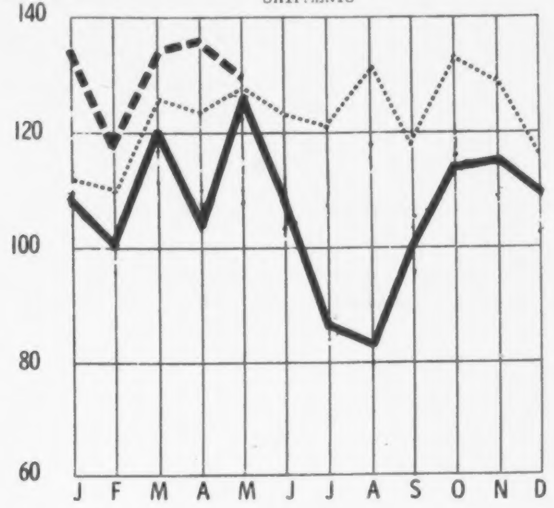
	YEAR		FEB. 1980	MARCH 1980	APRIL 1980	MAY 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
	1978	1979						
PAPER					R	P		
Newsprint - Production	3768	4062	368	394	374	390	4562	16.7
- Shipments	3779	4066	367	387	382	390	4547	16.3
Printing & Writing	14581	15539	1319	1408	1336	1301	16235	5.5
Groundwood Paper - Shipments	1349	1530	117	134	135	128	1556	4.2
- New Orders	1408	1541	119	138	124	104	1562	2.7
- Unfilled Orders	184	152	173	182	172	159	159	8.2
Coated Paper - Shipments	4448	4525	390	415	377	367	4714	4.4
- New Orders	4428	4546	407	373	403	407	4924	7.4
- Unfilled Orders	404	512	420	378	404	430	430	-1.8
Unctd Free Sheet - Shipments	7225	7868	681	729	693	667	8364	8.0
- New Orders	7542	7881	647	687	662	607	7995	1.5
- Unfilled Orders	754	789	768	716	692	630	630	-18.2
Thin Paper - Production *	350	376	29	28	28	30	353	-8.5
Cotton Fiber Paper - Shipments	114	125	12	11	11	10	135	3.9
Bleached Bristols -Production*	1095	1114	90	91	93	99	1114	-0.9
Tissue Paper - Production	4215	4535	371	399	373	370	4554	0.5
Total Packaging & Other Paper	5789	5725	493	511	469	480	5936	4.1
Unbl. Kraft Paper - Shipments	3884	3934	335	346	319	325	4013	1.3
Other Paper - Production * #	1905	1791	158	165	150	155	1924	10.4
TOTAL PAPER-Production-Unadj.	28353	29861	2551	2713	2551	2541	31288	5.9
-Production-S.A.			2584	2569	2536	2496	30735	5.2
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	22790	23838	1952	2110	1995	2099	24547	3.0
Unbl. Kraft Linerboard - Total	13228	13951	1156	1240	1168	1246	14427	5.0
Production for Export	1466	1645	150	161	146	176	1937	23.7
Other Unbl. Kraft Paperboard	1144	1200	81	101	94	97	1137	-12.8
Semichemical Paperboard	4439	4689	393	422	408	414	4943	5.6
Production for Export	119	98	12	12	9	8	123	22.0
Solid Bleached Paperboard	3979	3998	322	347	326	343	4040	-1.3
Production for Export	430	491	46	45	40	52	540	9.9
Recycled Paperboard	7485	7591	625	666	580	571	7427	-4.6
Production for Export	22	22	2	4	5	4	42	90.9
TOTAL PAPERBOARD-Prod.-Unadj.	30275	31429	2576	2776	2576	2670	31975	1.2
- Containerboard Prod.(Dom. Use)	17908	18825	1542	1661	1577	1649	19280	3.6
- Boxboard Production (Dom. Use)	6505	5776	472	512	469	470	5828	-3.2
- All Other P'bd Prod.(Dom. Use)	3825	4571	352	381	330	310	4225	-11.8
- Total Paperbd Prod. for Export	2037	2257	210	223	199	240	2641	21.2
TOTAL PAPERBOARD PROD. - S.A.			2626	2677	2510	2497	31286	0.6
WET MACHINE BOARD *	136	144	12	13	12	12	150	15.0
BUILDING PAPERS *	1915	1900	145	149	145	140	1730	-10.7
INSULATING BOARD *	1416	1422	100	95	90	100	1153	-20.7
TOTAL ALL GRADES - Unadjusted	62095	64755	5384	5746	5374	5462	66296	2.5
- Production - S.A.			5485	5492	5281	5231	65063	1.9
HARD PRESSED BD. [not in total]*	2294	2123	158	124	120	120	1632	-22.8

*	Census Data - Production. Last two months estimated.	S.A.	Seasonally Adjusted
#	Production excludes API bleached kraft envelope.	P	Preliminary
##	Includes revisions not available monthly.	R	Revised
###	Data for unbleached kraft folding boxboard for 1979 and 1980 included in All Other.		

THOUSANDS OF TONS

GROUNDWOOD PAPER, UNCOATED

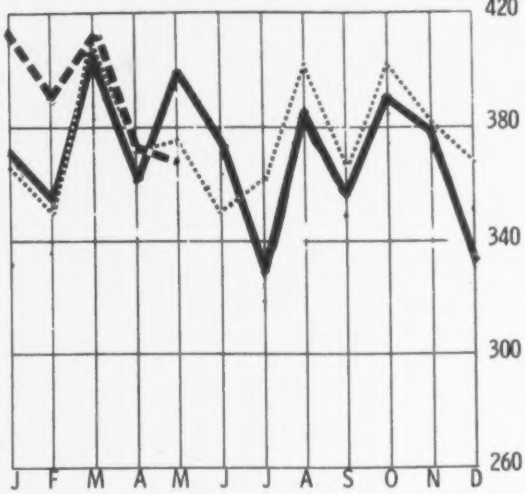
SHIPMENTS



COATED PAPER

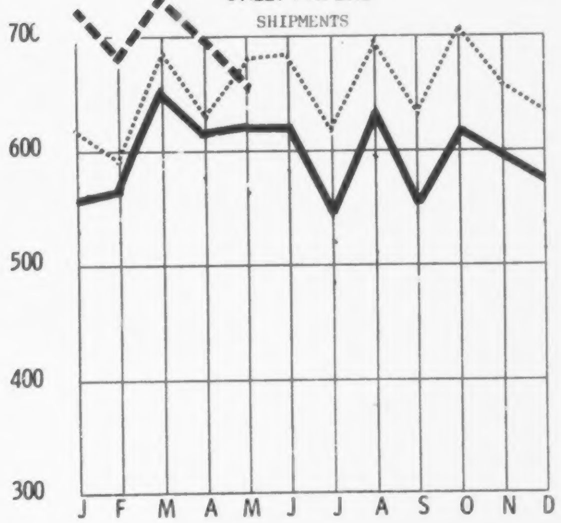
SHIPMENTS

THOUSANDS OF TONS



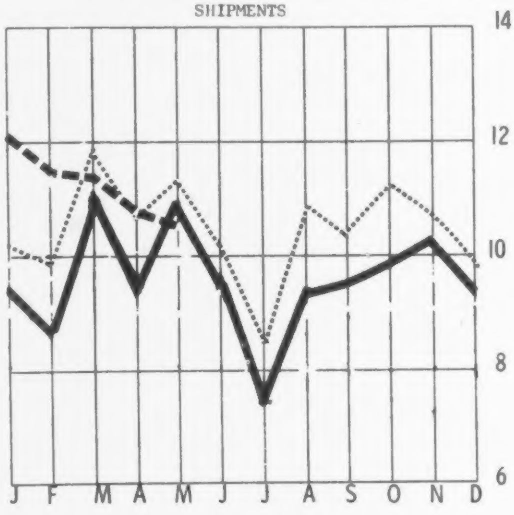
UNCOATED FREE SHEET PAPERS

SHIPMENTS



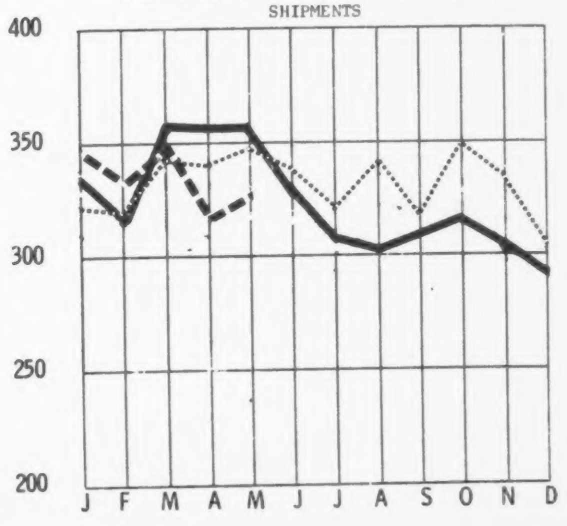
COTTON FIBER PAPER

SHIPMENTS



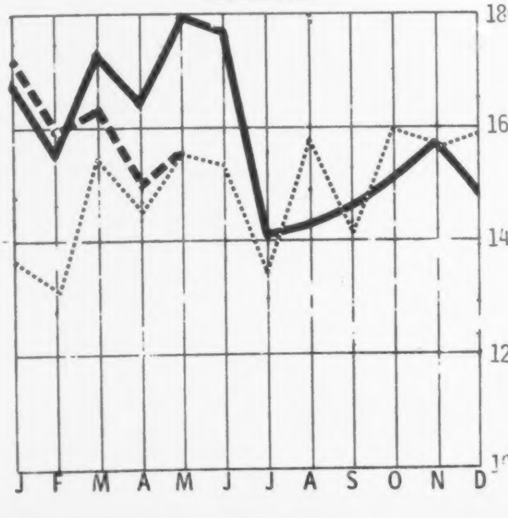
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

WOOD PULP STATISTICS
(Thousands of Tons)

		YEAR 1978	1979	JAN. 1980	FEB. 1980	MARCH 1980	APRIL 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
TOTAL WOOD PULP (1)						R	P		
Total Wood Pulp	- Production	47228	49743	4391	4153	4496	4243	51847	6.9
	- Imports	4025	4324	365	328	445	320	4374	4.8
	- Exports	2599	2935	212	269	321	360	3488	47.2
	- New Supply	48653	51133	4543	4212	4621	4202	52733	4.9
Dissolving Pulp	- Production	1411	1497	146	125	134	134	1613	22.8
	- Imports	189	193	25	21	21	32	296	35.9
	- Exports	758	764	43	54	91	84	818	32.7
	- New Supply	842	926	128	92	63	81	1091	19.3
Paper Grades Chemical Pulp	- Production	37893	39785	3528	3337	3604	3390	41576	6.8
	- Imports	3627	3930	325	301	396	282	3912	3.4
	- Exports	1780	2100	160	210	220	268	2572	51.0
	- New Supply	39740	41614	3694	3428	3780	3403	42915	4.7
Groundwood and Thermo-Mech.	- Production	4141	4394	364	359	394	375	4474	3.4
	- Imports	208	201	15	6	28	6	167	-2.0
	- Exports	62	70	10	5	10	8	97	101.8
	- New Supply	4287	4525	369	360	413	373	4543	2.1
Semi-Chemical	- Production	3783	4068	353	332	365	345	4184	6.7
	- Imports	0	0						
	- Exports	0	0	------	Included	with	Groundwood	Pulp ------	
	- New Supply	3783	4068	353	332	365	345	4184	6.7
MARKET WOOD PULP									
Total Market Wood Pulp	- Production	5126	5667	556	511	544	542	6459	27.7
	- Imports	2816	3046	276	238	300	252	3201	0.6
	- Exports	2480	2784	219	272	301	296	3265	42.7
	- New Supply	5462	5930	613	477	543	498	6395	7.4
Dissolving Pulp	- Production	1406	1497	145	124	134	134	1610	22.0
	- Imports	291	306	17	16	17	30	239	-38.2
	- Exports	824	869	56	66	97	89	922	40.0
	- New Supply	873	934	106	74	53	75	927	-11.5
Paper Grades Chemical Pulp	- Production	3644	4107	404	378	403	402	4762	28.7
	- Imports	2495	2734	259	221	279	222	2942	5.5
	- Exports	1613	1870	155	200	202	201	2272	42.8
	- New Supply	4525	4971	508	400	480	423	5433	10.9
Groundwood Pulp and All Other	- Production	76	64	6	8	7	7	86	132.3
	- Imports	26	7	1	1	5	0	20	191.3
	- Exports	42	46	8	6	3	7	71	88.9
	- New Supply	59	25	0	3	10	7	35	457.1

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1978 - 3,140; 1979 - 3,018; A.R.Y-T-D'80 - 2,424

SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

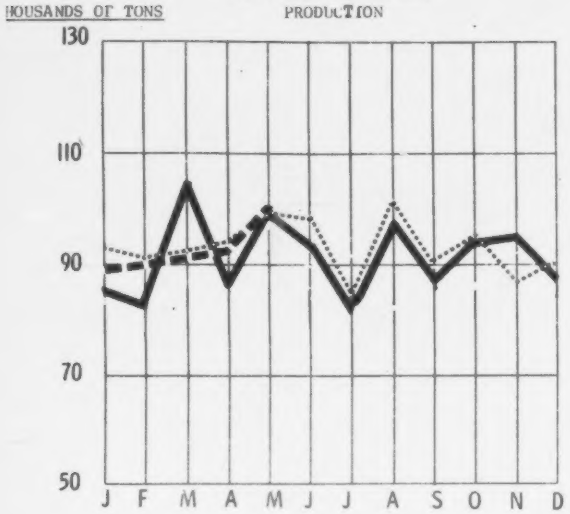
FIBROUS RAW MATERIALS
(Thousands of tons)

	1978	1979	JAN. 1980	FEB. 1980	MARCH 1980	APRIL 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	63449	66199	5733	5397	5822	5310	66787	3.6
Total Wood Pulp (2) A	47911	50156	4357	4100	4479	4103	51116	3.9
Market Wood Pulp A	4774	5031	441	418	443	400	5104	0.3
Waste Paper (3) A	14760	15400	1324	1246	1286	1157	15038	3.0
Rags, Straw & Other C, E	778	643	53	51	57	50	633	-7.5
INVENTORIES								
Wood Pulp at Pulp Mills A	130	107	105	109	115	130	130	0.0
Market Pulp at Pulp Mills A	187	132	160	140	143	165	165	0.0
Mkt Pulp at Ppr.& Bd. Mills CE	435	426	418	418	451	450	450	3.9
Waste Ppr.at Ppr.&Bd. Mills (4)	740	798	905	818	756	818	818	5.5
Rags, Straw and Other at Paper and Board Mills C, E	66	61	57	56	57	53	53	-17.2
Mkt Wood Pulp Days of Supply A	44	38	38	36	39	43	43	7.6
Wood Pulp Consumption at at Non-Paper Mills C, E	884	909	74	72	73	70	866	-6.0

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.(000 tons): 1978 - 1,666; 1979 - 1,593
(3) Census Waste Paper Consumption, (000 tons): 1978 - 12,481; 1979 - 12,962; Jan-Mar '80 A.R. - 12,792
(4) Census data prior to 1979; more recent data are from the Paper Stock Conservation Committee, A.P.I.

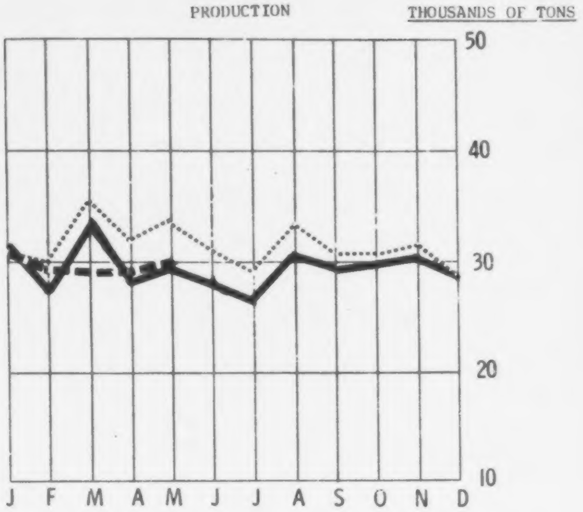
BLEACHED BRISTOLS

PRODUCTION



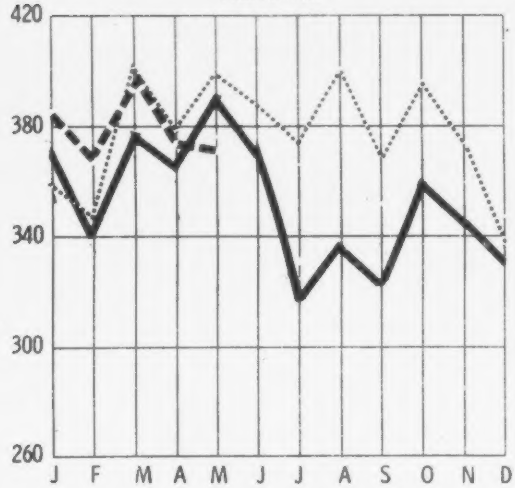
THIN PAPERS

PRODUCTION



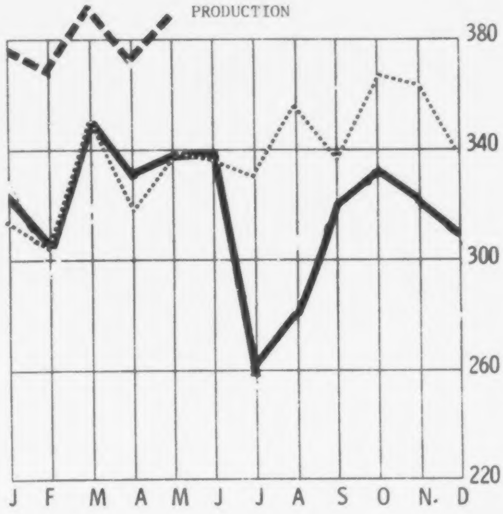
TISSUE PAPER

PRODUCTION



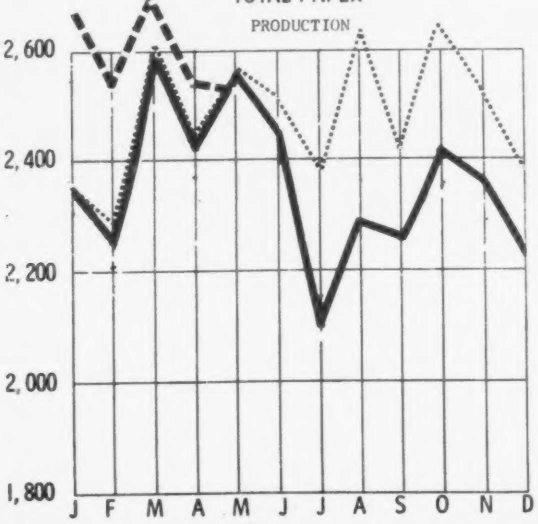
NEWSPRINT

PRODUCTION



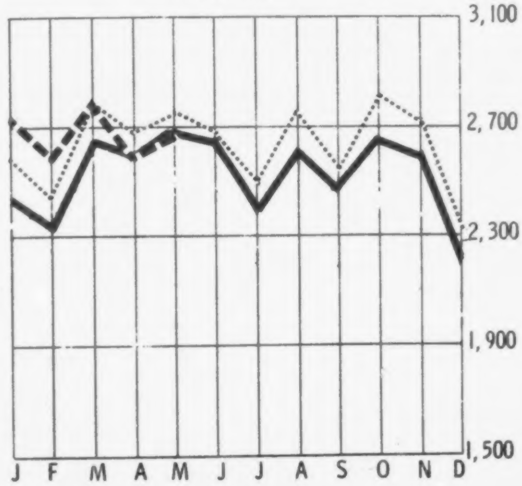
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1978 ━━━ 1979 ········ 1980 ━ ━ ━

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

PULPWOOD		YEAR		JAN.	FEB.	MARCH	APRIL	Annual Rate Y-T-D	% Change from same Period
		1978	1979	1980	1980	1980	1980	1980	Last Year
Total U.S.	- Total Receipts	77025	78625	6906	6996	6895	6677	82422	11.2
	- Total Consumpt.	77290	79566	6923	6614	7044	6762	82029	3.3
	- Residues *	30369	30015	2415	2353	2491	2294	28659	-1.6
	- Inventories	6244	5506	5320	5677	5555	5464	5464	13.8
So. Atlantic	- Total Receipts	25353	26126	2248	2195	2209	2274	26778	5.0
	- Total Consumpt	25204	26523	2320	2235	2388	2253	27588	4.8
	- Residues *	8513	8858	730	694	760	722	8718	-1.4
	- Inventories	1191	1052	997	987	823	850	850	-17.9
Northeast	- Total Receipts	6664	7461	735	837	666	508	8238	13.7
	- Total Consumpt	6607	7584	680	635	682	659	7968	0.7
	- Residues *	1662	1670	119	153	146	150	1704	-0.7
	- Inventories	770	674	667	862	865	706	706	20.3
South Central	- Total Receipts	25572	26654	2281	2193	2202	2220	26688	5.7
	- Total Consumpt	25678	26432	2275	2171	2289	2209	26832	-0.0
	- Residues *	8418	8669	737	644	662	556	7797	-12.4
	- Inventories	1194	1472	1485	1495	1400	1404	1404	93.7
North Central	- Total Receipts	5291	5630	612	656	558	360	6558	32.2
	- Total Consumpt	5330	5535	459	446	449	448	5406	-5.6
	- Residues *	1456	1501	129	122	112	124	1461	8.0
	- Inventories	968	993	1119	1317	1436	1325	1325	85.8
West	- Total Receipts	14145	12754	1030	1115	1260	1315	14160	26.8
	- Total Consumpt	14471	13492	1189	1127	1236	1193	14235	12.7
	- Residues *	10320	9317	700	740	811	742	8979	8.0
	- Inventories	2121	1315	1052	1016	1031	1179	1179	-32.4

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

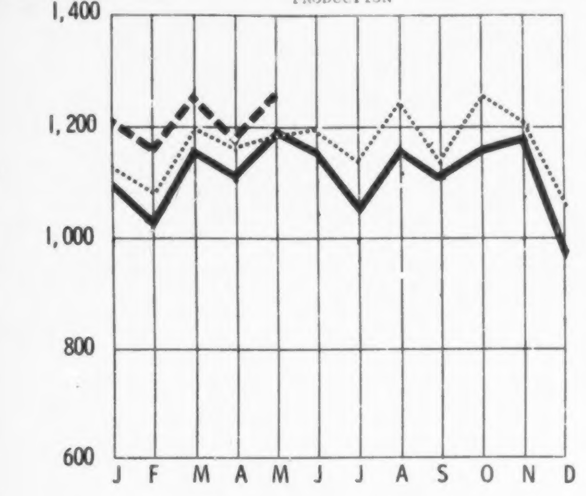
IMPORTS FROM CANADA

	YEAR 1979		MARCH 1980		APRIL 1980		Annual Rate Y-T-D	% Change from same Period
	Tons	$000	Tons	$000	Tons	$000	1980	Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206050	8867	26832	1161	5085	450	210999	19.3
Pulpwood Chips	1527734	30440	171262	4183	124704	3258	1574799	15.5
Wood Pulp, Total	4143944	1404354	414810	163372	304758	127522	4150095	3.1
Waste Fibrous Materials, Total	88344	13727	6513	1015	10815	1897	84607	3.2
Paper,Paperboard&Products,Total	8501965	2779223	788245	279896	734146	252000	8922981	3.6
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8457803	2725085	784240	273687	724042	242453	8857067	3.3
Paper, Total	8015574	2642945	733262	263870	677834	233584	8265560	1.3
Newsprint	7077209	2249470	676375	236234	628306	210077	7547961	3.9
Printing,Writing & Rel.Pap.	799355	322818	46149	21480	43411	19719	618098	-18.0
Pack. & Ind. Conv. Paper	118815	57854	10163	5754	5221	3185	90718	-25.7
Special Industrial Paper	3157	3324	93	123	91	132	1152	-72.2
Tissue Paper	17039	9479	482	280	804	471	7631	-52.1
Paperboard, Total	80636	17653	9295	2432	8862	2286	110533	56.7
Wet Machine Board	1522	703	232	123	187	90	1836	29.6
Construction Paper and Bd. *	360071	63784	41451	7263	37159	6494	479137	41.4
Convtd Paper&Paperbd Products	44163	54138	4005	6210	10104	9547	65914	54.9

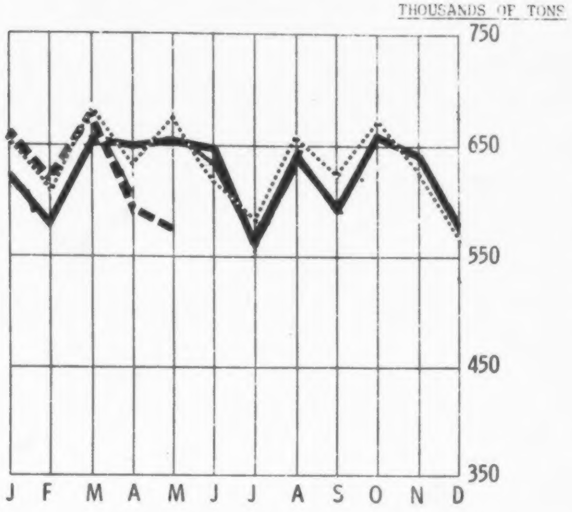
EXPORTS TO CANADA

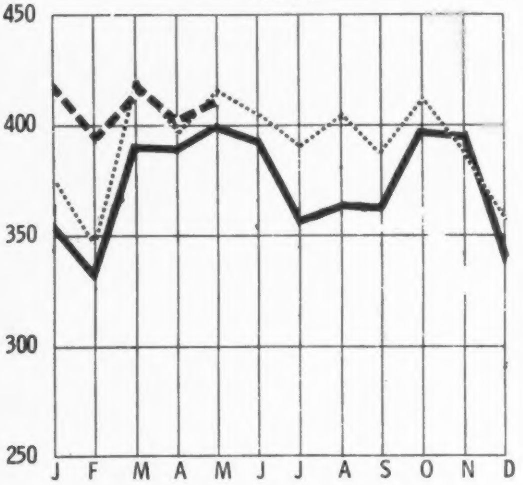
	YEAR 1979		MARCH 1980		APRIL 1980		Annual Rate Y-T-D	% Change from same Period
	Tons	$000	Tons	$000	Tons	$000	1980	Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	263367	11446	18732	663	10134	479	151152	-67.1
Pulpwood Chips	87790	3790	3371	90	1121	51	24645	-72.4
Wood Pulp, Total	136641	49608	21602	5355	15300	4782	178638	40.1
Cotton Pulp & Other Pulp	7921	3728	1292	424	550	277	12384	47.3
Waste Paper	478477	50207	51940	5059	49348	4701	564516	49.8
Paper,Paperboard&Products,Total	624928	353202	56671	34350	48918	30126	634526	4.9
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	454029	248403	38150	22837	33645	20648	454749	1.9
Paper, Total	181451	142407	16562	15058	16039	14404	214496	21.1
Newsprint	2803	1734	129	154	179	186	1881	-51.0
Printing,Writing & Rel.Pap.	108290	76567	9647	7513	9055	7131	114590	7.9
Pack. & Ind. Conv. Paper	16084	10108	847	697	1377	1057	16202	3.3
Special Industrial Paper	46773	48173	5264	6126	4768	5471	76175	81.8
Tissue	7502	5825	675	569	660	559	5648	-40.6
Paperboard, Total	230904	83021	18300	6594	14290	4771	203624	-7.3
Wet Machine Board	5262	9916	252	148	478	242	3816	-35.2
Construction Pap. & Bd. E *	36411	13059	3037	1037	2838	1231	32814	-24.7
Convtd Paper&Paperbd Products	170900	104799	18521	11513	15273	9478	179777	13.4
* - Hard Pressed Board (not in total)								
Imports of Hard Pressed Bd.	29771	5370	5422	1043	2858	519	41097	125.6
Exports of Hard Pressed Bd.	20535	6878	2001	678	1688	557	20013	-22.9

SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

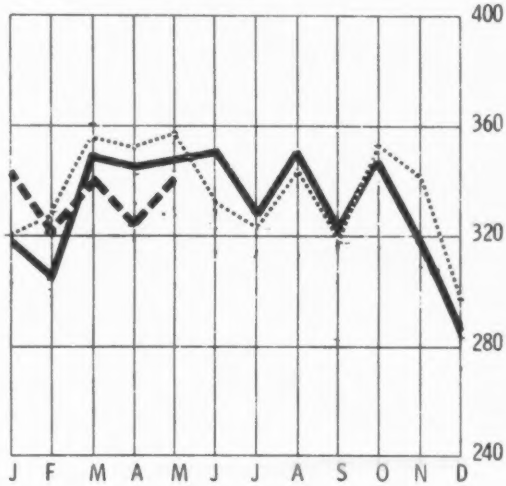

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

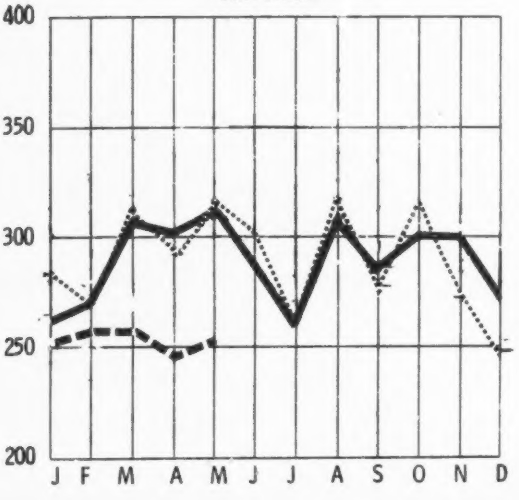

RECYCLED PAPERBOARD


SEMI-CHEMICAL PAPERBOARD

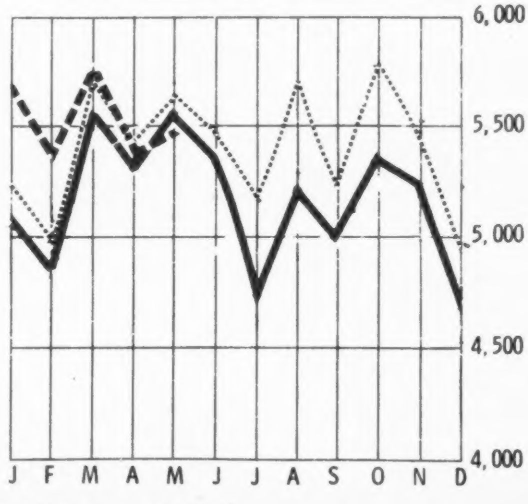
PRODUCTION


SOLID BLEACHED PAPERBOARD

PRODUCTION


WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION


TOTAL PAPER AND BOARD

PRODUCTION

1978 ▬▬ 1979 ······· 1980 ▬ ▬ ▬

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1979 Tons	YEAR 1979 $000	MARCH 1980 Tons	MARCH 1980 $000	APRIL 1980 Tons	APRIL 1980 $000	(1) Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206074	8869	26832	1161	5085	450	210999	19.3
Pulpwood Chips	1574763	33413	171262	4183	124716	3267	1574835	12.3
Total All Imports	13554749	4693607	1282443	482144	1096948	418345	13883199	3.2
Wood Pulp, Total	4324033	1465179	444965	173665	319953	132788	4374366	4.8
Waste Paper	62310	8625	3069	279	8242	1537	49008	-11.5
Other Fibrous Materials	43640	13149	4523	1608	3573	1107	46076	-10.3
Paper,Paperbd&Products,Total	9124767	3206665	829886	306592	765180	282914	9413749	2.6
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9028643	2983554	823910	292510	750222	256848	9303119	2.4
Paper, Total	8561213	2894764	770123	282094	701802	247552	8683460	0.3
Newsprint	7224195	2300450	684885	239498	630787	211275	7675317	4.2
Printing & Writing	1176253	510579	73659	35492	64166	32116	898875	-19.2
Uncoated Groundwood	804598	295996	45812	18990	39274	16042	586764	-22.2
Uncoated Book	142674	69291	10544	5364	10279	5474	120318	-7.6
Coated Print.& Impres. Pap	188846	108590	15490	8852	12499	7518	161661	-17.6
Bristols	2247	1243	116	79	85	86	2257	39.5
Writing and Similar Paper	22964	23403	1106	1407	1509	2240	19564	2.7
Thin (except Cigarette)	14924	12057	592	800	519	755	8310	-23.5
Total Pkg & Other Paper	143452	74013	11070	6809	6045	3691	101236	-36.5
Unbleached Kraft Paper	66816	23211	4116	1679	2858	1348	38310	-48.4
Other Pkg. & Indust. Paper	76636	50802	6954	5131	3187	2343	62926	-26.1
Tissue	17312	9722	509	295	804	471	8033	-51.0
Paperboard, Total	82203	19111	9435	2599	8883	2308	111363	55.7
Test or Containerboard	25725	6021	4448	1269	4058	1060	52561	149.1
Semi-Chemical Corrugating	33494	5889	2970	593	2564	497	34073	-4.2
Other Paperboard	22984	7201	2017	737	2260	751	24728	66.7
Wet Machine Board	2345	1341	249	136	252	168	2644	10.0
Construction Paper & Bd. *	382883	68338	44103	7682	39285	6819	505652	41.7
Building Paper	330147	56768	40242	6804	36993	6219	464064	50.1
Insulating Board	21682	4664	1384	321	953	288	16834	-28.7
Other Building Board	31054	6906	2477	558	1339	312	24754	2.9
Convtd Paper&Paperbd Products	96124	223111	5976	14082	14958	26066	110630	25.7
Paper Products, Total	90317	211663	5541	13057	14464	25034	105080	26.0
Paperboard Products, Total	5807	11447	434	1025	495	1032	5550	19.4
Notes								
Other: No Weight Avail. ($000)		81899		6144		5658	68544	-10.0
Total Imports Incl. Other($000)		4775506		488288		424003	5351696	19.4

EXPORTS

							(1)	
Pulpwood, Roundwood (in cords of 128 cu. ft.)	263721	11473	21560	726	10167	481	171657	-62.7
Pulpwood Chips	4498671	197847	265850	19397	414961	30702	4236417	3.6
Total All Exports	8971706	3348409	965453	370914	1029590	404326	10953623	39.3
Wood Pulp,Total	2934815	1103783	320633	131930	360465	147328	3487998	47.2
Cotton Pulp and Other Pulp.	131444	74579	14599	7770	14998	10382	167961	36.1
Waste and Old Paper	2233246	256107	257064	29058	247654	30826	2906850	45.7
Paper, Paperbd&Products, Total	3672203	1913940	373157	202156	406473	215790	4390814	30.1
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	3109859	1328320	314568	142037	346967	154335	3743474	32.1
Paper, Total	600874	507569	58107	51206	65963	56804	741069	38.9
Newsprint	71456	32046	4445	2051	17090	6713	114414	92.7
Printing & Writing	274608	233371	24234	22121	24806	23837	285293	12.2
Uncoated Groundwood	80392	55384	7495	5207	6591	5095	73163	-2.8
Clay Coated Paper	73521	57743	6020	5069	7330	5476	82095	20.7
Uncoated Free Sheet	68159	64146	5428	6099	6593	7427	69596	14.9
Other Printing & Writing	52536	56098	5292	5746	4292	5839	60439	20.0
Total Pkg. & Other Paper	226906	218218	24249	22477	17979	21032	293780	50.3
Unbleached Kraft	63695	27079	11280	4528	5182	2304	115766	95.4
Other Pkg. & Indust. Paper	163211	191138	12969	17950	12798	18728	178015	30.7
Tissue	27905	23934	5179	4557	6088	5223	47582	94.3
Paperboard, Total	2446972	769902	250879	88638	273650	94650	2932023	31.4
Solid Wood Pulp	2271161	712276	229949	81346	257411	87602	2749468	33.5
Total Linerboard	1644901	434515	151063	46443	187309	57162	1950934	29.4
Bleached Kraft Linerboard	179995	51186	20405	7009	14539	4893	188208	3.8
Unbleached Kraft Linerbd	1464906	383330	130658	39434	172770	52268	1762726	32.9
Other Unbleached Kraft	100301	33739	19733	6580	21918	7304	196751	92.8
Other Bleached Kraft	508601	238813	58184	27960	46162	22491	584833	33.3
Semi-Chemical Corrugating	17358	5208	970	364	2023	646	16949	57.3
Recycled Paperboard	175811	77626	20930	7291	16238	7048	182556	5.7
Wet Machine Board	7371	5146	547	322	802	619	7170	-18.5
Construction Paper & Bd. *	54642	25704	5035	1871	6552	2261	63211	5.3
Building Paper	34020	14420	2071	708	2059	752	28079	-28.0
Insulating Board E	20623	11284	2964	1162	4493	1509	35132	67.1
Convtd Paper&Paperbd Products	562343	585620	58589	60119	59506	61455	647340	19.5
Paper Products, Total	332256	427080	33660	41105	39104	46140	395608	29.9
Paperboard Products, Total	230087	158540	24930	19015	20402	15315	251732	6.2
Notes								
Other: No Weight Avail. ($000)		9803		966		892	11567	29.5
Total Exports Incl. Other($000)		3358212		371879		405218	4198675	48.3

* Hard Pressed Board (not in total)								
Imports of Hard Pressed Board	260775	39528	16511	3052	10625	2105	182166	-17.3
Exports of Hard Pressed Board	32030	11223	3198	1064	2478	836	28494	-13.7

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1978	YEAR 1979	DEC. 1979	JAN. 1980	FEB. 1980	MARCH 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint	3489	3797	323	388	370	385	4574	26.6
Uncoated Groundwood Papers	1569	1674	135	122	112	126	1438	-14.2
Coated Papers	4513	4675	388	423	379	418	4881	6.4
Uncoated Free Sheet (1)	7315	7508	614	689	658	716	8251	12.1
Cotton Fiber Paper (1)	119	127	10	12	12	10	140	5.8
Thin Papers	350	376	28	31	29	28	357	-6.3
Bleached Bristols	1127	1114	90	97	86	92	1099	-0.2
Tissue Paper	4245	4310	328	377	353	375	4420	5.5
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3873	3923	304	342	344	345	4127	9.7
Other Paper (1)	1905	1791	159	173	158	165	1986	17.0
TOTAL PAPER GRADES	28505	29295	2378	2656	2501	2661	31272	9.7
PAPERBOARD								
Solid Wood Pulp Furnish	22500	22833	1765	2040	1921	2047	24032	8.5
Unbleached Kraft Linerboard	13215	13685	1039	1195	1134	1198	14104	4.9
Other Unbl. Kraft Paperboard	898	1014	61	92	84	108	1136	12.0
Bleached Kraft Paperboard	4002	3934	311	349	326	343	4073	12.3
Semi-Chemical Paperboard	4384	4200	354	405	377	399	4719	16.2
Recycled Paperboard	7534	7240	594	645	630	658	7735	6.4
TOTAL PAPERBOARD GRADES	30034	30073	2358	2685	2551	2706	31767	8.0
WET MACHINE BOARD	136	144	16	14	12	13	155	18.3
CONSTR. PAPER & INSUL. BOARD	3332	3322	230	237	245	244	2905	-12.6
TOTAL ALL GRADES [Excl. H.P.B.]*	62006	62834	4983	5591	5310	5624	66099	7.7

PRODUCER PRICE INDEXES

1967 = 100

	1978	1979	FEB.	MARCH	APRIL	MAY		
Pulp, Paper and Products	195.6	219.0	238.9	241.6	246.5	248.9	242.7	14.5
Pulp, Paper & Products, except Waste Paper ♦	195.6	219.2	239.2	241.9	246.6	249.3	242.9	14.6
Total Wood Pulp	266.5	314.3	358.5	359.0	386.8	388.0	369.8	24.3
Total Paper	206.1	229.6	247.5	250.5	253.6	256.5	250.7	12.3
Total Paper, exc. Newsprint	199.4	222.8	240.3	244.4	248.5	249.5	244.1	12.7
Newsprint	226.3	249.9	269.4	269.4	269.4	277.6	271.0	11.8
Total Paperboard	179.6	202.1	223.4	225.9	230.2	239.2	228.1	17.7
Total Paper and Paperboard ♦	197.8	220.9	239.9	242.8	246.3	251.1	243.6	13.9
Converted Products	186.5	209.9	228.7	231.3	234.6	236.1	231.7	14.1
Waste Paper	191.2	206.6	223.2	224.9	242.5	226.1	227.9	13.6
All Commodities	209.3	235.5	259.8	261.5	262.3	263.7	260.4	14.9
Industrial Commodities	209.4	236.4	265.4	268.2	270.7	271.2	267.2	18.4

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. ♦ Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

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Part of this strength reflected production for export. The May export total of 176,000 tons, while not a record high rate was exceeded only by the peak export rates reached in 1971 and 1972. The five month 1980 production for export total was 24% over the year-ago level. Production of semi-chemical paperboard also ran fairly strong, with the five month total 5.6% over year-ago level.

Consumption of containerboard at fibre box plants and shipments of corrugated shipping containers from box plants declined in April and May 1980 from their lofty first quarter levels. On a seasonally adjusted basis, the April rate of shipments was 5% below the first quarter average; the May rate was 14% below that average. Consumption of containerboard at box plants showed somewhat smaller declines, suggesting some build-up of inventories of finished boxes at box plants. Inventories of containerboard at box plants and at paperboard mills increased 219,000 tons from April 1 to June 1, 1980. However, the inventory level as of June 1 represented 6.2 weeks of supply at current rates of consumption, which is not high by historic standards.

Production of solid bleached paperboard in the first five months of 1980 dipped 1.3% below its year-ago total. Production for domestic use showed an even sharper decline as production for export moved to new highs. The five months 1980 export production rate, at 540,000 tons per year, was 10% over the corresponding year-ago rate and about the same percentage over the average level for all of 1979. Declines in production of bleached paperboard for domestic use were concentrated in milk carton and lightweight cup stock. Heavyweight cup and plate, dish and tray stocks showed an increase over their year-ago level, but the May 1980 figures were below the May 1979 levels. Production of nearly all the recycled paperboard grades in the first five months of 1980 were below the year-ago levels, with the total down 4.6%.

Market Trends

The major markets for paper and paperboard have been moving downward since March. Total production of non-durable goods in May 1980, at an index level of 159.6 (1967 = 100) was down by 3.4% from its first quarter average, while total printing and production activity was down by 4.2% during that same period. However, the production of consumer non-durable goods declined by only 1.3% in that period. Production of durable goods, by way of contrast was 6% below its first quarter average in May 1980. Total economic activity, as measured by the real gross national product, dropped a little over 2% from the first quarter of 1980 to the second quarter, according to preliminary estimates. This is an 8.5% per year rate of decline, which is fairly steep and significant since it is almost totally in final sales.

Imports, Exports and New Supply

Imports of paper, paperboard and products in April 1980 at an annual rate of 9.0 million tons, were about 4% below their first quarter average. Exports, at 4.9 million tons per year, were up about 15%.

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Based on the available data for the first two months of 1980, it appears that the new supply in the second quarter is at a rate of about 67.5 million tons per year, 6% below the 71.7 million tons per year high of the first quarter. This decline is somewhat larger than the production declines recorded in the paper and paperboard's end-use markets and in total real GNP.

Sales and Earnings

The Federal Trade Commission recently released data on sales and earnings of paper and allied products companies for the first quarter of 1980.

The table below summarizes the data for that quarter together with the corresponding data for the four quarters of 1979.

The sales total for the first quarter of 1980, at $14.7 billion represents a new high and marks a 13% increase over the first quarter 1979 total. Before-tax earnings were down 9%, while after-tax earnings showed a drop of 8%. However, earnings are based on the total operations of the corporations, which include extraordinary items. Data compiled from reports in the press indicate that paper industry profits in the first quarter of 1980 were above their adjusted year-ago totals. (See May 1980 Monthly Statistical Summary)

PAPER AND ALLIED PRODUCTS COMPANIES

SALES AND EARNINGS

					Income After Taxes as % of	
	Net Sales	Income Before Taxes	Income After Taxes	Stock-holders' Equity	Net Sales	Stock-holders' Equity
	$ Million					
1979 - First Q	12,997	1,286	867	21,282	6.7%	13.2%
Second Q	13,828	1,360	917	21,808	6.6%	16.8%
Third Q	14,133	1,686	1,162	22,688	8.2%	20.5%
Fourth Q	14,401	1,074	777	23,206	5.4%	13.4%
Full Year	55,359	5,406	3,723	23,206**	6.7%	16.0%
1980 First Quarter	14,682	1,167	795	24,002	5.4%	13.2%
Percent Change 1st Q 80/1st Q'79	+13.0%	-9.3%	-8.3%	+12.8%		

*Annual Rate **Year End

Source: Federal Trade Commission

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

JUNE 26, 1980

	PRODUCTION (000 TONS)					
	May 1980	April 1980	May 1979	Jan - 1980	- May 1979	% Change 80/79
PAPER GRADES	P	R				
Newsprint	390	374	339	1901	1629	16.7
Uncoated Groundwood (s)	128	135	132	648	622	4.2
Coated Paper (s)	367	377	374	1964	1881	4.4
Uncoated Free Sheet Paper (s)	667	693	685	3485	3226	8.0
Thin Paper (c)	30	28	34	147	161	-8.5
Cotton Fiber Paper (s)	10	11	11	56	54	3.9
Bleached Bristols (c)	99	93	99	464	468	-0.9
Tissue Paper	370	373	398	1898	1889	0.5
Unbleached Kraft Packaging & Indl. Converting (s)	325	319	346	1672	1651	1.3
Other Paper (c)	155	150	156	802	726	10.4
TOTAL PAPER	2541	2552	2574	13037	12307	5.9
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1246	1168	1184	6011	5726	5.0
Other Kraft Paperboard	97	94	110	474	544	-12.8
Semichemical Paperboard	414	408	416	2059	1951	5.6
Bleached Paperboard	343	326	355	1684	1705	-1.3
Recycled Paperboard	571	580	671	3095	3243	-4.6
TOTAL PAPERBOARD	2670	2576	2737	13323	13169	1.2
CONSTRUCTION & WET MACH GRADES(c)	252	247	314	1264	1468	-13.9
TOTAL PAPER AND PAPERBOARD	5462	5374	5625	27624	26944	2.5
HARD PRESSED BD.[not in total](c)	120	120	187	680	881	-22.8

WOOD PULP (ALL GRADES)	April 1980	March 1980	April 1979	Jan - 1980	-April 1979	% Change 80/79
Dissolving & Special Alpha	134	134	121	538	438	22.8
Bleached Sulphite	119	124	120	480	408	17.8
Unbleached Sulphite	32	34	32	131	129	1.6
Bleached & Semi-Bl. Sulph.	1597	1676	1501	6458	5876	9.9
Unbleached Sulphate	1641	1771	1673	6790	6560	3.5
Semichemical	345	365	341	1395	1307	6.7
Groundwood and Thermo-Mechanical	375	394	366	1491	1443	3.4
TOTAL PULP DIVISION DATA	4243	4496	4154	17282	16160	6.9
Defib. Exploded & Scrngs E	181	191	263	808	997	-19.0
TOTAL WOOD PULP PRODUCTION	4424	4687	4417	18090	17157	5.4

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments   R - Revised   E - Estimate   NC - Not comparable
P - Preliminary   (c) - Census Data - Production, last 2 months estimated.

June 27, 1980

	Full Year		INDUSTRY DATA			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	1980 R	P		
PAPER AND PAPERBOARD -- Tons (000)	1978	1979	March	April	May		
Total Production (API).......¦ ¦...	62095	64755	5746	5374	5462	66296	2.5
Total Seasonally Adjusted....¦ excluding ¦...			5492	5281	5231	65063	1.9
Imports (including Products).¦hard pressed¦..E	9117	9125	830	765	765	9367	2.2
Exports (including Products).¦ board ¦..E	3373	3672	373	407	405	4485	31.6
Apparent Consumption.........¦ ¦...	67840'a	70208Rb	5949	5639	5591	69948c	0.5
Paper Production % Tonnage Capacity...........	93.1 s	95.9Rs	98.1	94.5	90.7	96.0sh	-
Paperboard Production % Tonnage Capacity......	92.8 s	94.2Rs	95.7	91.2	90.7	93.1s	-
			February	March	April		
MARKET WOOD PULP PRODUCTION - Tons (000).........	5126	5667	511	544	542	6459	27.7
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	47228	49743	4153	4496	4243	51847	6.9
WOOD PULP IMPORTS - TONS (000)..................	4025	4324	328	445	320	4374	4.8
WOOD PULP EXPORTS - TONS (000)..................	2599	2935	269	321	360	3488	47.2
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			February	March	April		
Wood Pulp..(k)............................	47911	50156	4100	4479	4103	51116	3.9
Waste Paper....(d)........................	14760	15400	1246	1286	1157	15038	3.0
Other (Census)...........................E	778	643	51	57	50	633	-7.5
Total................	63449	66199	5397	5822	5310	66787	3.6
..WOOD PULP - NON PAPER.......................E	884	909	72	73	70	866	-6.0
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	77290	79566	6614	7044	6762	82029	3.3
EMPLOYMENT (000)			March	April	May		
Paper and Allied Products..........Total......	700.9	714.1	710.7	707.8	702.6	708.6	0.2
Pulp, Paper and Board Mills........Total.....E	267.0	271.2	271.3	269.8	268.0	270.6	1.4
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products.....................	6.52	7.12	7.54	7.62	7.61	7.55	9.8
Pulp, Paper Mills..........................E	7.44	8.26	8.76	8.87	8.87	8.79	11.1
Paperboard Mills...........................E	7.68	8.38	8.89	9.07	9.07	8.94	10.4
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q4	1980 Q1	1980 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	3.46	4.88	5.23	5.91	5.97	6.04y	23.8
INDEX OF OUTPUT PER MAN-HOUR (1967=100)..........			January	February	March		
¦IN PULP, PAPER ¦...Production Workers..........	153.9	159.4	170.5	166.4	165.3	167.4	5.1
¦AND BOARD MILLS¦...All Employees...............	148.4	153.6	163.6	159.7	158.4	160.6	5.0
PAPER AND ALLIED PRODUCTS (Million $)			February	March	April		
Industry Shipments (Dept. of Commerce)*........	57654	66033	5857	5863	5837	70872	11.4
Pulp, Paper and Paperboard*.................	25343	30165	2803	2746	2747	33087	15.0
Inventories (End of Period) - Total Industry*.	5875	6779	7156	7296	7336	7336	18.2
Pulp, Paper and Paperboard*.................	2006	2321	2421	2435	2510	2510	21.9
			1979 Q3	1979 Q4	1980 Q1		
Sales (Corporations Only, FTC)................	48982RS	55359	14133	14401	14682	58728	13.0
Earnings (Corporations Only, FTC).............	2598RS	3724	1162	778	795	3180	-8.3
Depreciation (Corporations Only, FTC).........	1726RS	1896	481	489	504	2016	12.8
Net Worth (Corporations Only, FTC)............	20794RS	23206	22688	23206	24002	24002	12.8
PRICE INDEXES (Bureau of Labor Stats)1967=100			March	April	May		
Total Pulp, Paper and Allied Products.........	195.6	219.0	241.6	246.5	248.9	242.7	14.5
Wood Pulp.....................................	266.5	314.3	359.0	386.8	388.0	369.8	24.3
Waste Paper...................................	191.2	206.6	224.9	242.5	226.1	227.9	13.6
Paper...	206.1	229.6	250.5	253.6	256.5	250.7	12.3
Paperboard....................................	179.6	202.1	225.9	230.2	239.2	228.1	17.7
PAPER DEMAND (INDEXED: 1967=100)			March	April	May		
Total Paper Production *......................	135.5	142.7	147.2	145.3	143.0	146.7	5.2
Paper New Supply *............................	132.9	137.9	143.3	138.6	136.8	140.7	3.5
Total End - Use Index *.....................	139.5	144.5	145.8	143.1	141.2	144.7	0.3
Production of Nondurable Goods *...(19%)..	157.0	163.3	164.3	161.8	159.6	163.4	0.8
Disposable Income (Constant $) *...(23%)..	145.2	148.5	148.1	147.0	146.0	148.0	-0.4
Total Printing and Publishing *...(58%)..	131.5	136.8	138.8	135.5	133.3	137.3	0.4
Trend Factor				Not Available			
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production *................	132.8	137.9	140.8	132.0	131.3	137.1	0.6
Production for Domestic Use	131.1	135.5	136.8	128.8	125.8	133.0	-1.0
Total End - Use Index *.....................	147.7	151.6	150.1	147.3	144.4	148.7	-2.1
Production of Consumer Goods *...(60.49%)	149.1	150.3	147.9	145.2	142.7	146.5	-3.1
Production of Equipment *...(6.62%)	132.8	142.1	146.0	145.1	143.4	145.2	3.1
Production of Materials *...(32.89%)	148.3	156.0	155.1	151.5	147.6	153.4	-1.3
Trend Factor				Not Available			
NEWSPRINT MARKETS			February	March	April		
Consumption by Publishers - Tons (000)........	10872	11240	874	970	931	10936	0.0
Newspaper Pub. and Printing Emp. Total (000)..	407.4	420.7	429.3	428.8	428.4	428.7	3.3
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	115090	117972	8496	10605	10328	110589	4.6
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	17586	19721	1774	1799	1726	21408	14.1
Inventories (End of Period)	1482	1695	1694	1740	1782	1782	18.7
Paper Only..............................Sales	13078	14788	1290	1354	1298	15816	12.5
Inventories (End of Period)	1025	1141	1144	1185	1217	1217	19.5
RETAIL TRADE (Million $)			March	April	May		
Total Retail Sales *..........................	799054	884407	76534	74774	73458	917815	6.7
Nondurable Goods Stores Sales *..............	518190	576882	52238	52073	51935	624158	12.4
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)*.	146.1	152.1	151.6	148.6	145.5	150.1	-1.2
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	209.3	235.5	261.5	262.3	263.7	260.4	14.9
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	195.4	217.4	239.8	242.5	244.9	239.4	14.4
			February	March	April		
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	275.6	311.3	308.2	307.6	306.1	306.1	8.3
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1979 Q3	1979 Q4	1980 Q1		
G.N.P. or Expenditure - Current $.............	2127.6	2368.8	2396.5	2456.9	2520.8	2520.8	10.0
G.N.P. OR Expenditure - 1972 $................	1399.2	1431.6	1433.3	1440.3	1444.7	1444.7	1.0

lb/capita	Popul.(mil)
.a - 620	218.7
.b - 637	220.6
.c - 630	221.9

.d - 1977 - 12103; 1978 - 12481
. 1979 12956;Jn-Mr'80A.R.12792
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1978 - 3,140; 1979 - 3,018; 1980 A.R.Y-T-D 2,424 (000 tons)
s - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '78 - 1,666; '79 - 1,593 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
* - Seasonally adjusted

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MONTHLY STATISTICAL SUMMARY

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AMERICAN PAPER INSTITUTE

260 Madison Avenue New York, N. Y. 10016

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Vol. 58 JULY 1980 No. 7

PAPER AND PAPERBOARD: SECOND QUARTER 1980

Total Industry

The rate of paper and paperboard production held fairly steady during the past three months, but it was 4% below the first quarter record rate. At a seasonally adjusted rate of 63.6 million tons per year, production was 1.4% below the average 1979 level. The construction and wet machine board grades showed the greatest declines, falling 11% from the first to second quarter on a seasonally adjusted basis. If these grades are excluded, the decline in the rate of paper and paperboard production alone from the first to second quarters of 1980 was 3.6%.

Imports and Exports

Even with the relatively sharp decline in total economic activity recorded from the first to second quarters of 1980, imports of total paper and paperboard showed only a small decline. This reflected the strength in newsprint imports, as newspaper publishers built up inventories in preparation for strikes at Canadian newsprint mills. Excluding newsprint, imports of paper, paperboard and products fell by 10% from the January-May 1979 period to the January-May 1980 period. Exports, on the other hand, rose sharply; exports of linerboard in the January-May 1980 period were some 28% above their year-ago level. API data on production of kraft linerboard for export indicate a further increase in June, suggesting that for the first six months of the year, kraft linerboard exports were about 30% above their year-ago total.

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New Supply

The rate of new supply (production plus imports less exports) of paper and board in the second quarter of 1980 was an estimated 68.3 million tons per year, 4.5% below the first quarter record high rate of 71.5 million tons per year, but only 2.5% below the total 1979 rate.

The second quarter 1980 rate of total paper and paperboard new supply was about in line with requirements by paper and paperboard consumers. This appears to be the case whether the consumption is viewed in terms of the economy as a whole, or viewed at the level of the first consumer. For example, the ratio of paper and board new supply to total economic activity as measured by the real gross national product in the second quarter of 1980 was 48.4 thousand tons per billion dollars of real GNP. During the four years 1976 through 1979 the ratio of new supply of paper and paperboard to real GNP averaged 48.5 thousand tons per billion dollars. This suggests that at 48.5 thousand tons per billion dollars of real GNP, new supply is in balance with requirements of the final consumer. When adjustment is made for the build-up in newsprint inventories, new supply in the second quarter may have been a little less than the indicated use.

Similarly, a comparison of new supply to production of consumer non-durable goods, a major market for paper and paperboard packaging, shows the average level of new supply in the first half of 1980 close to the average of this ratio for 1979 as a whole.

Production by Grade

Within the grade structure, production of paper held up a little better than paperboard during the first half of this year. The rate of paper production declined 2.[illegible] from the first to second quarters of 1980; paperboard production declined 4.8%.

Domestic newsprint production in the first six months of 1980 was 17% above its year-earlier total. This reflected not only inventory demand for newsprint, but also the impact of several new domestic newsprint mills coming on stream during the past year and a half.

While the production of printing/writing grades remained above the year-ago level for the first half of the year, the second

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PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

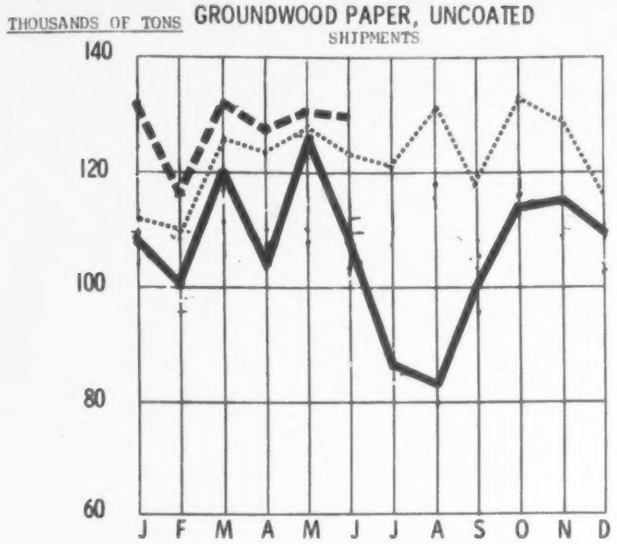
(Thousands of Tons)

	YEAR 1978	YEAR 1979	MARCH 1980	APRIL 1980	MAY 1980	JUNE 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint - Production	3768	4062	395	374	405	386	4612	17.3
- Shipments	3779	4066	387	382	402	385	4584	16.7
Printing & Writing	14596	15368	1399	1319	1322	1293	16052	5.1
Groundwood Paper - Shipments	1354	1509	132	127	132	131	1540	3.9
- New Orders	1414	1519	136	116	105	122	1519	0.8
- Unfilled Orders	185	149	179	170	157	150	150	2.2
Coated Paper - Shipments	4403	4527	415	377	380	372	4701	5.1
- New Orders	4433	4547	373	403	421	382	4897	8.8
- Unfilled Orders	404	513	378	405	436	451	451	8.2
Unctd Free Sheet - Shipments	7221	7813	725	684	682	666	8289	6.6
- New Orders	7538	7826	682	652	623	593	7839	-0.5
- Unfilled Orders	754	781	711	689	641	560	560	-24.4
Thin Paper - Production *	350	376	28	27	30	28	348	-9.5
Cotton Fiber Paper - Shipments	114	125	11	11	10	10	131	2.3
Bleached Bristols - Production	1103	1018	88	94	89	86	1044	1.4
Tissue Paper - Production	4215	4506	398	371	376	340	4475	-1.1
Total Packaging & Other Paper	5789	5725	511	469	480	450	5847	2.0
Unbl. Kraft Paper - Shipments	3884	3934	346	319	325	305	3954	-0.5
Other Paper - Production * #	1905	1791	165	150	155	145	1893	7.6
TOTAL PAPER-Production-Unadj.	28367	29661	2703	2533	2584	2469	30986	5.2
-Production-S.A.			2560	2517	2538	2496	30580	4.6
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	22790	23838	2111	1996	2099	2058	24577	2.7
Unbl. Kraft Linerboard - Total	13228	13951	1241	1169	1247	1258	14549	5.2
Production for Export	1466	1645	162	147	177	221	2061	30.6
Other Unbl. Kraft Paperboard	1144	1200	101	93	96	84	1112	-14.7
Semichemical Paperboard	4439	4689	422	408	414	401	4921	4.6
Production for Export	119	98	12	9	8	28	158	58.7
Solid Bleached Paperboard	3979	3998	347	326	343	314	3996	-2.1
Production for Export	430	491	45	40	52	50	550	9.3
Recycled Paperboard	7485	7591	666	580	571	566	7322	-5.3
Production for Export	22	22	4	5	4	4	44	110.0
TOTAL PAPERBOARD-Prod.-Unadj.	30275	31429	2777	2576	2670	2625	31900	0.8
- Containerboard Prod.(Dom. Use)	17908	18825	1661	1577	1649	1566	19201	2.7
- Boxboard Production (Dom. Use)	6505	5776	511	469	470	437	5727	-4.2
- All Other P'bd Prod.(Dom. Use)	3825	4571	381	330	311	318	4158	-12.8
- Total Paperbd Prod. for Export	2037	2257	223	200	241	303	2813	27.7
TOTAL PAPERBOARD PROD. - S.A.			2678	2511	2498	2638	31352	0.4
WET MACHINE BOARD *	136	144	13	12	12	11	147	12.0
BUILDING PAPERS *	1915	1900	149	145	140	135	1711	-12.4
INSULATING BOARD *	1416	1422	95	95	100	90	1151	-20.9
TOTAL ALL GRADES - Unadjusted	62109	64555	5737	5360	5506	5330	65896	1.9
- Production - S.A.			5484	5267	5274	5365	64937	1.5
HARD PRESSED BD. [not in total]*	2294	2123	124	120	120	110	1580	-24.7

*	Census Data - Production. Last two months estimated.	S.A.	Seasonally Adjusted
#	Production excludes API bleached kraft envelope.	P	Preliminary
##	Includes revisions not available monthly.	R	Revised
###	Data for unbleached kraft folding boxboard for 1979 and 1980 included in All Other.		

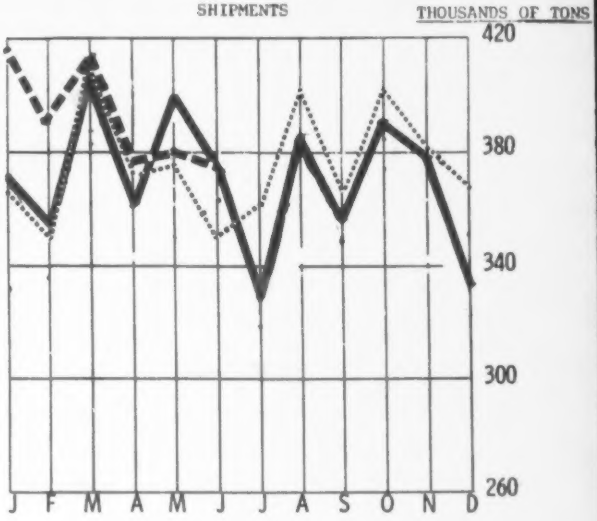
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



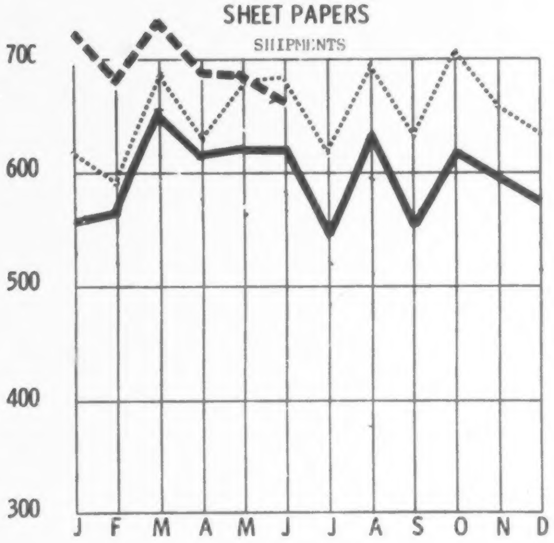
COATED PAPER

SHIPMENTS



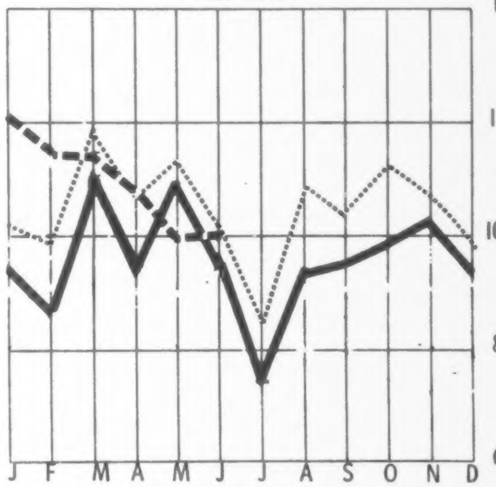
UNCOATED FREE SHEET PAPERS

SHIPMENTS



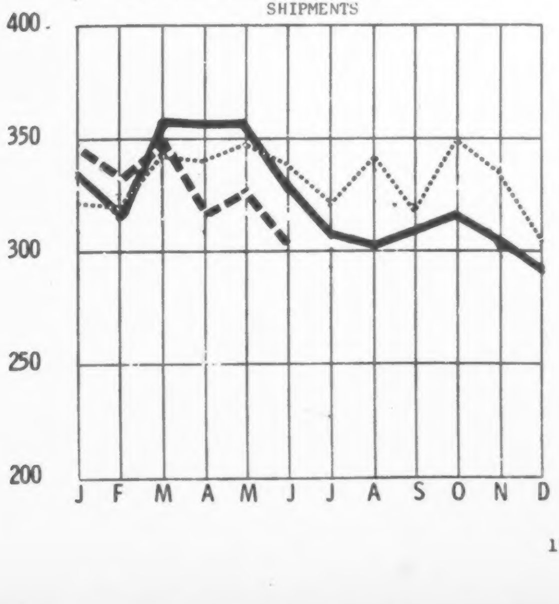
COTTON FIBER PAPER

SHIPMENTS



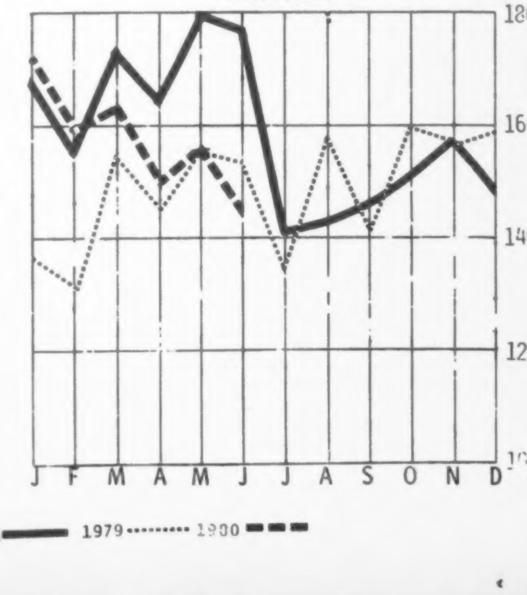
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

WOOD PULP STATISTICS

(Thousands of Tons)

	YEAR		FEB. 1980	MARCH 1980	APRIL 1980	MAY 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
	1978	1979						
TOTAL WOOD PULP (1)					R	P		
Total Wood Pulp - Production	47228	49743	4153	4496	4243	4447	52151	6.1
- Imports	4025	4324	328	445	320	373	4395	-0.8
- Exports	2599	2935	269	321	360	317	3552	46.0
- New Supply	48653	51133	4212	4621	4202	4503	52994	3.6
Dissolving Pulp - Production	1411	1497	125	134	134	138	1621	17.1
- Imports	189	193	21	21	32	19	282	45.0
- Exports	758	764	54	91	84	58	794	31.0
- New Supply	842	926	92	63	81	99	1110	14.0
Paper Grades Chemical Pulp - Production	37893	39785	3337	3604	3390	3564	41815	6.1
- Imports	3627	3930	301	396	282	328	3917	-2.4
- Exports	1780	2100	210	220	268	254	2669	50.1
- New Supply	39740	41614	3428	3780	3403	3638	43063	3.4
Groundwood and Thermo-Mech. - Production	4141	4394	359	394	375	395	4526	3.7
- Imports	208	201	6	28	6	26	195	-12.1
- Exports	62	70	5	10	8	5	90	79.5
- New Supply	4287	4525	360	413	373	415	4632	2.1
Semi-Chemical - Production	3783	4068	332	365	345	351	4189	4.6
- Imports	0	0						
- Exports	0	0	------ Included with Groundwood Pulp ------					
- New Supply	3783	4068	332	365	345	351	4189	4.6
MARKET WOOD PULP								
Total Market Wood Pulp - Production	5126	5667	511	544	543	572	6544	24.2
- Imports	2816	3046	238	300	252	239	3134	-1.2
- Exports	2480	2784	272	301	298	287	3304	43.2
- New Supply	5462	5930	477	543	498	524	6373	4.0
Dissolving Pulp - Production	1406	1497	124	134	134	138	1619	16.5
- Imports	291	306	16	17	30	15	227	-39.4
- Exports	824	869	66	97	89	72	910	32.2
- New Supply	873	934	74	53	75	81	935	-13.0
Paper Grades Chemical Pulp - Production	3644	4107	378	403	403	428	4839	26.3
- Imports	2495	2734	221	279	222	223	2890	3.6
- Exports	1613	1870	200	202	202	213	2331	47.6
- New Supply	4525	4971	400	480	423	438	5397	7.0
Groundwood Pulp and All Other - Production	76	64	8	7	7	7	86	83.7
- Imports	26	7	1	5	0	1	17	188.0
- Exports	42	46	6	3	8	2	63	54.1
- New Supply	59	25	3	10	0	5	41	233.3

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1978 - 3,140; 1979 - 3,018; A.R.Y-T-D'80 - 2,402

SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

FIBROUS RAW MATERIALS

(Thousands of tons)

CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	63449	66199	5398	5821	5310	5562	66780	2.1
Total Wood Pulp (2) A	47911	50156	4101	4479	4103	4325	51273	2.5
Market Wood Pulp A	4774	5031	418	443	400	410	5067	-0.9
Waste Paper (3) A	14760	15400	1246	1286	1157	1185	14875	1.1
Rags, Straw & Other C, E	778	643	51	57	50	52	631	-7.1
INVENTORIES								
Wood Pulp at Pulp Mills A	130	107	109	115	131	160	160	31.6
Market Pulp at Pulp Mills A	187	132	140	143	160	179	179	-10.9
Mkt Pulp at Ppr.& Bd. Mills CE	435	426	418	451	450	450	450	3.7
Waste Ppr.at Ppr.&Bd. Mills (4)	740	798	818	756	818	794	794	-4.7
Rags, Straw and Other at Paper and Board Mills C, E	66	61	56	57	53	55	55	-30.4
Mkt Wood Pulp Days of Supply A	44	38	36	39	43	44	44	4.7
Wood Pulp Consumption at at Non-Paper Mills C, E	884	909	72	73	70	73	868	-6.5

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API

P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons

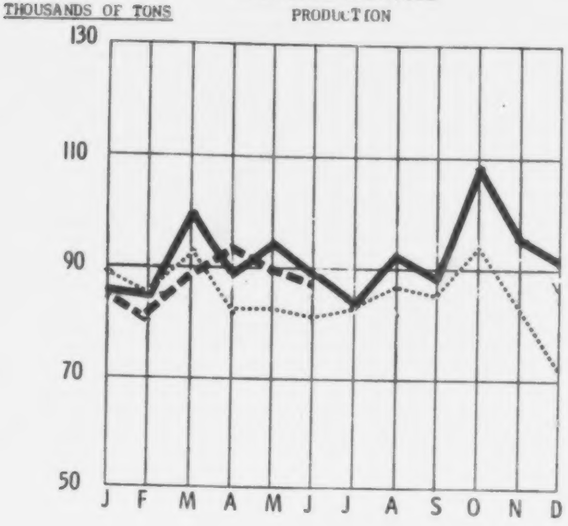
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.(000 tons): 1978 - 1,666; 1979 - 1,593

(3) Census Waste Paper Consumption, (000 tons): 1978 - 12,481; 1979 - 12,962; Jan-Mar '80 A.R. - 12,792

(4) Census data prior to 1979; more recent data are from the Paper Stock Conservation Committee, A.P.I.

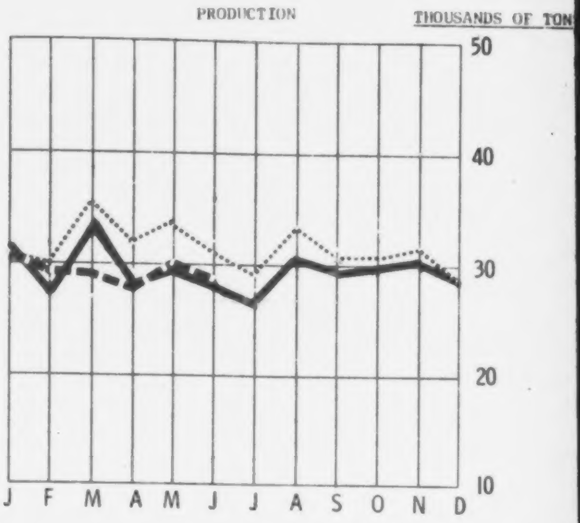
BLEACHED BRISTOLS

PRODUCTION



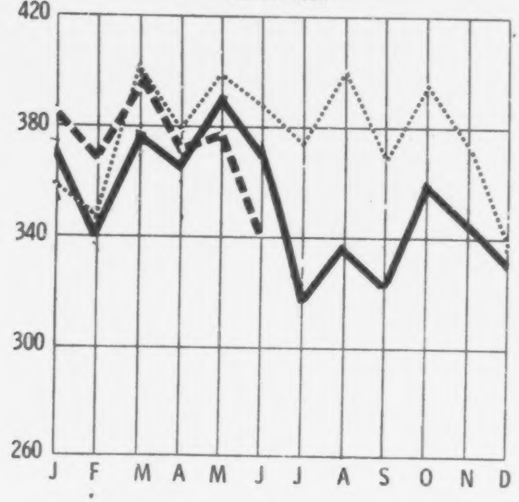
THIN PAPERS

PRODUCTION



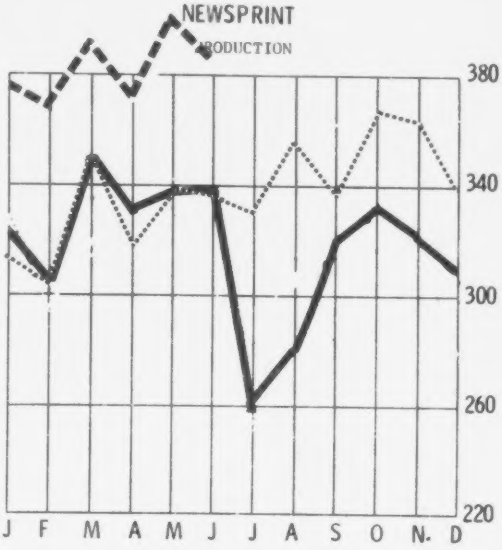
TISSUE PAPER

PRODUCTION



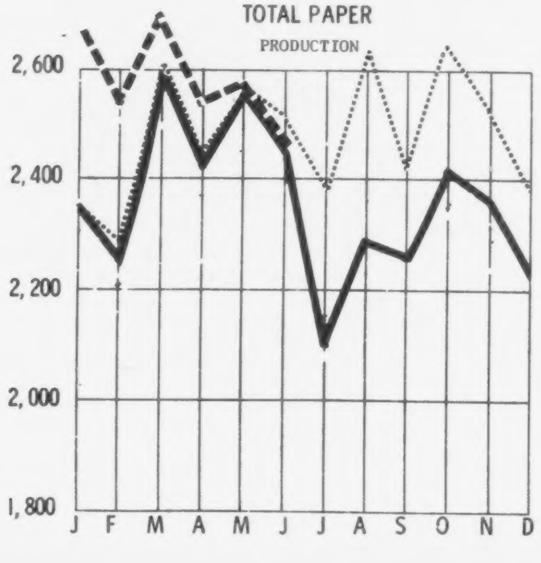
NEWSPRINT

PRODUCTION



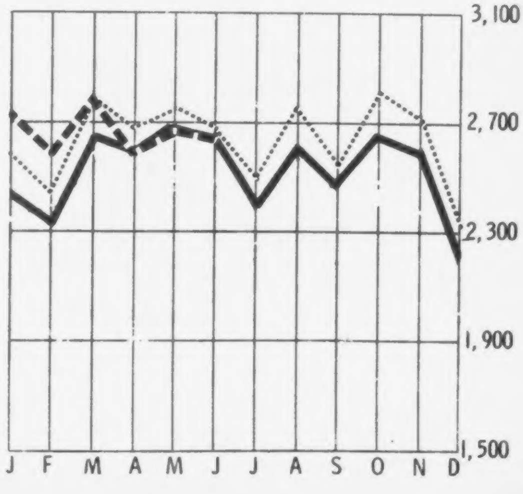
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1978 ━━━ 1979 ········ 1980 ■ ■ ■

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1978	YEAR 1979	FEB. 1980	MARCH 1980	APRIL 1980	MAY 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	77025	78625	6996	6895	6677	6790	82234	9.7
	- Total Consumpt.	77290	79566	6614	7044	6762	6811	81970	2.8
	- Residues *	30369	30015	2353	2491	2294	2404	28697	-3.4
	- Inventories	6244	5506	5677	5555	5464	5425	5425	17.9
So. Atlantic	- Total Receipts	25353	26126	2195	2209	2274	2349	27060	6.1
	- Total Consumpt	25204	26523	2235	2388	2253	2267	27511	4.8
	- Residues *	8513	8858	694	760	722	730	8726	-1.1
	- Inventories	1191	1052	987	823	850	958	958	-0.4
Northeast	- Total Receipts	6664	7461	837	666	508	509	7812	9.0
	- Total Consumpt	6607	7584	635	682	659	622	7867	0.3
	- Residues *	1662	1670	153	146	150	143	1706	-0.8
	- Inventories	770	674	862	865	706	587	587	8.7
South Central	- Total Receipts	25572	26654	2193	2202	2220	2194	26616	3.6
	- Total Consumpt	25678	26432	2171	2289	2209	2335	27070	0.4
	- Residues *	8418	8669	644	662	556	569	7603	-15.9
	- Inventories	1194	1472	1495	1400	1404	1268	1268	67.9
North Central	- Total Receipts	5291	5630	656	558	360	407	6223	25.0
	- Total Consumpt	5330	5535	446	449	448	461	5431	-6.1
	- Residues *	1456	1501	122	112	124	114	1442	3.1
	- Inventories	968	993	1317	1436	1325	1255	1255	96.4
West	- Total Receipts	14145	12754	1115	1260	1315	1331	14522	24.8
	- Total Consumpt	14471	13492	1127	1236	1193	1126	14090	9.5
	- Residues *	10320	9317	740	811	742	848	9218	5.9
	- Inventories	2121	1315	1016	1031	1179	1357	1357	-20.5

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1979 Tons	YEAR 1979 $000	APRIL 1980 Tons	APRIL 1980 $000	MAY 1980 Tons	MAY 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206050	8867	5085	450	8909	414	190181	12.3
Pulpwood Chips	1527734	30440	124704	3258	186997	4683	1708632	16.0
Wood Pulp, Total	4143944	1404354	304758	127522	346607	145691	4151933	-2.8
Waste Fibrous Materials, Total	88344	13727	10815	1897	5704	1010	81375	-7.4
Paper,Paperboard&Products,Total	8501965	2779223	734146	252000	723864	268063	8875657	4.1
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8457803	2725085	724042	242453	718815	261820	8810810	3.8
Paper, Total	8015574	2642945	677834	233584	674096	253146	8230279	2.0
Newsprint	7077209	2249470	628306	210077	621990	227843	7531145	5.4
Printing,Writing & Rel.Pap.	799355	322818	43411	19719	45975	21685	604819	-22.7
Pack. & Ind. Conv. Paper	118815	57854	5221	3185	5464	3059	85689	-31.4
Special Industrial Paper	3157	3324	91	132	197	275	1394	-60.4
Tissue Paper	17039	9479	804	471	470	283	7233	-49.3
Paperboard, Total	80636	17653	8862	2286	11635	3264	116350	60.1
Wet Machine Board	1522	703	187	90	80	44	1662	8.8
Construction Paper and Bd. *	360071	63784	37159	6494	33004	5366	462519	35.2
Convtd Paper&Paperbd Products	44163	54138	10104	9547	5048	6243	64847	54.5

EXPORTS TO CANADA

	YEAR 1979 Tons	YEAR 1979 $000	APRIL 1980 Tons	APRIL 1980 $000	MAY 1980 Tons	MAY 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	263367	11446	10134	479	9203	472	143009	-64.0
Pulpwood Chips	87790	3790	1121	51	2461	113	25622	-74.2
Wood Pulp, Total	136641	49608	15300	4782	16897	5047	183463	43.1
Cotton Pulp & Other Pulp	7921	3728	550	277	2267	1129	15348	76.1
Waste Paper	478477	50207	49348	4701	44219	4801	557738	44.0
Paper,Paperboard&Products,Total	624928	353202	48918	30126	48090	32283	623036	3.4
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	454029	248403	33645	20648	34692	21864	447059	0.6
Paper, Total	181451	142407	16039	14404	20163	15029	219988	25.0
Newsprint	2803	1734	179	186	152	128	1869	-47.7
Printing,Writing & Rel.Pap.	108290	76567	9055	7131	8495	7285	112061	5.0
Pack. & Ind. Conv. Paper	16084	10108	1377	1057	1235	857	15925	-0.4
Special Industrial Paper	46773	48173	4768	5471	9626	6266	84042	108.4
Tissue	7502	5825	660	559	655	494	6091	-35.2
Paperboard, Total	230904	83021	14290	4771	11434	5435	190341	-13.5
Wet Machine Board	5262	9916	478	242	373	209	3949	-36.0
Construction Pap. & Bd. E *	36411	13059	2838	1231	2721	1191	32782	-22.2
Convtd Paper&Paperbd Products	170900	104799	15273	9478	13398	10419	175977	11.5

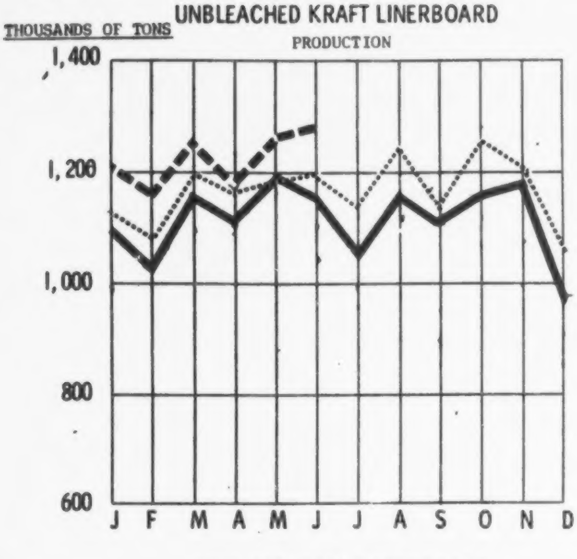
* - Hard Pressed Board (not in total)

Imports of Hard Pressed Bd.	29771	5370	2858	519	2694	499	39343	130.1
Exports of Hard Pressed Bd.	20535	6878	1688	557	1500	501	19610	-23.4

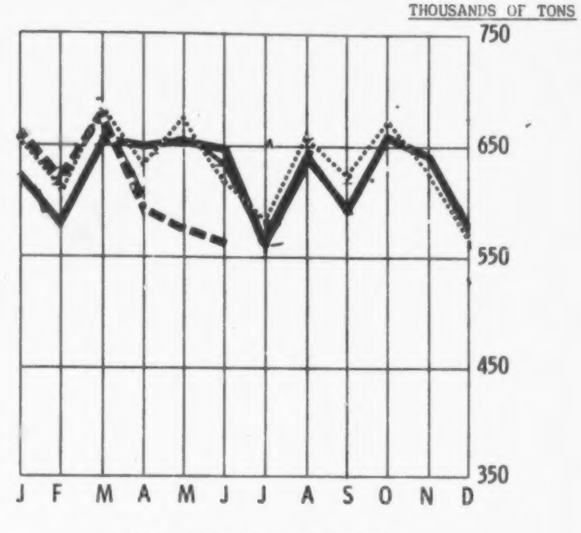
SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

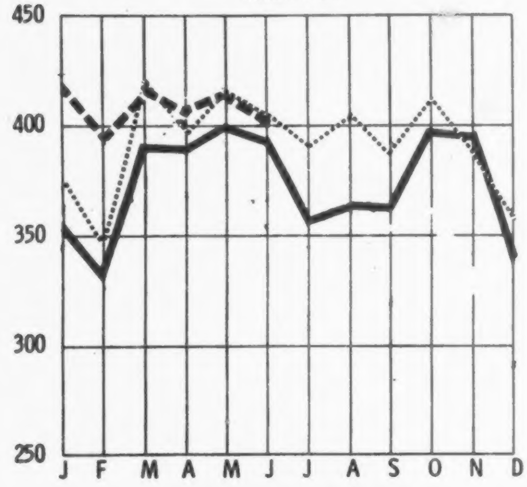


RECYCLED PAPERBOARD



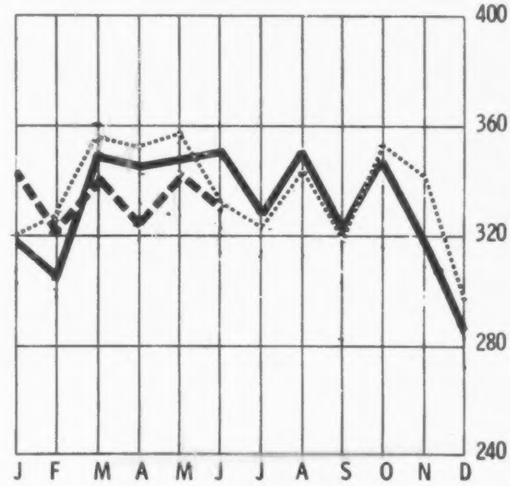
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



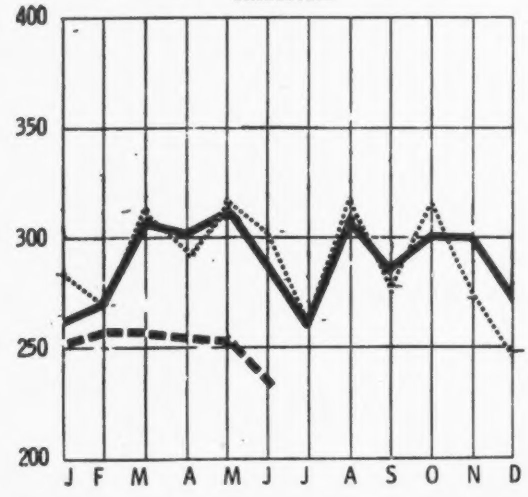
SOLID BLEACHED PAPERBOARD

PRODUCTION



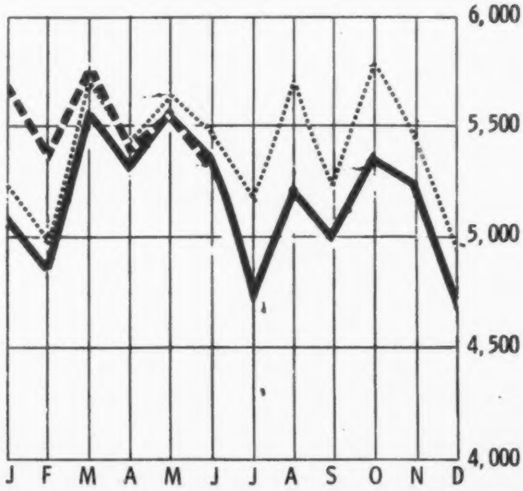
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1978 ▬▬ 1979 .... 1980 ▬ ▬ ▬

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

I M P O R T S

	YEAR 1979		APRIL 1980		MAY 1980		(1) Annual Rate Y-T-D	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	1980	
Pulpwood, Roundwood (in cords of 128 cubic feet)	206074	8869	5085	450	8912	414	190188	12.3
Pulpwood Chips	1574763	33413	124716	3267	186997	4683	1708661	11.5
Total All Imports	13554749	4693607	1096948	418345	1152583	464294	13872759	1.2
Wood Pulp, Total	4324033	1465169	319953	132788	372927	156463	4394518	-0.8
Waste Paper	62310	8625	8242	1537	2508	353	45226	-25.6
Other Fibrous Materials	43640	13149	3573	1107	3204	1069	44550	-5.4
Paper,Paperbd&Products,Total	9124767	3206665	765180	282914	773944	306410	9388466	2.4
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9028643	2983554	750222	256848	764725	283280	9277836	2.2
Paper, Total	8561213	2894764	701802	247552	717694	274066	8669233	0.4
Newsprint	7224195	2300450	630787	211275	647834	238571	7695055	5.8
Printing & Writing	1176253	510579	64166	32116	63334	31232	871101	-26.7
Uncoated Groundwood	804598	295996	39274	16042	41889	17832	569944	-27.2
Uncoated Book	142674	69291	10279	5474	11445	6298	123723	-29.5
Coated Print.& Impreg. Pap	188846	108590	12499	7518	8756	5166	150342	-23.8
Bristols	2247	1243	85	86	72	59	1979	15.1
Writing and Similar Paper	22964	23403	1509	2240	667	1181	17250	-9.2
Thin (except Cigarette)	14924	12057	519	755	506	697	7863	-30.0
Total Pkg & Other Paper	143452	74013	6045	3691	6055	3972	95519	-40.8
Unbleached Kraft Paper	66816	23211	2855	1348	3692	1646	39508	-49.7
Other Pkg. & Indust. Paper	76636	50802	3187	2343	2363	2326	56011	-32.4
Tissue	17312	9722	804	471	471	290	7558	-48.7
Paperboard, Total	82203	19111	8883	2308	11737	3413	117259	59.2
Test or Containerboard	25725	6021	4058	1060	5712	1620	55757	206.9
Semi-Chemical Corrugating	33494	5889	2564	497	3648	739	36014	3.3
Other Paperboard	22984	7201	2260	751	2378	1054	25489	23.5
Wet Machine Board	2345	1341	252	168	129	77	2424	-4.6
Construction Paper & Bd. *	382883	68338	39285	6819	35166	5724	488920	35.1
Building Paper	330147	56768	36993	6219	32545	5086	449359	44.2
Insulating Board	21682	4664	953	288	1350	346	16706	-29.8
Other Building Board	31054	6906	1339	312	1271	292	22854	-13.6
Convtd Paper&Paperbd Products	96124	223111	14958	26066	9219	23130	110629	23.0
Paper Products, Total	90317	211663	14464	25034	8543	21808	104567	22.9
Paperboard Products, Total	5807	11447	495	1032	676	1322	6063	25.7
Notes								
Other: No Weight Avail. ($000)		81899		5658		6559	70577	-7.9
Total Imports Incl. Other($000)		4775506		424003		470853	5411405	17.2

E X P O R T S

							(1)	
Pulpwood, Roundwood (in cords of 128 cu. ft.)	263721	11473	10167	481	9303	476	159653	-59.9
Pulpwood Chips	4498674	197847	414961	30702	451161	32279	4471920	11.3
Total All Exports	8971798	3348409	1029590	404326	911453	382280	10950385	36.7
Wood Pulp,Total	2934815	1103783	360465	147328	317312	132614	3551947	46.0
Cotton Pulp and Other Pulp	131444	74579	14998	10382	18100	10331	177809	36.8
Waste and Old Paper	2233246	256107	247654	30826	218878	27463	2850787	39.9
Paper, Paperbd&Products, Total	3672203	1913940	406473	215790	357163	211872	4369842	28.3
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	3109859	1328320	346967	154335	303663	148839	3723569	29.6
Paper, Total	600874	507569	65963	56804	77377	61584	778561	41.5
Newsprint	71456	32046	17090	6713	18977	8826	137076	154.5
Printing & Writing	274608	233371	24806	23837	22771	23108	282884	3.7
Uncoated Groundwood	80392	55384	6591	5095	6383	5019	73849	-10.1
Clay Coated Paper	73521	57743	7330	5476	6816	5943	82035	17.5
Uncoated Free Sheet	68159	64146	6593	7427	6252	7691	70680	2.6
Other Printing & Writing	52536	56098	4292	5839	3321	4456	56321	8.3
Total Pkg. & Other Paper	226906	218218	17979	21032	29347	24314	305456	53.8
Unbleached Kraft	63695	27079	5182	2304	9981	4408	116567	109.3
Other Pkg. & Indust. Paper	163211	191138	12798	18728	19366	19906	188890	32.2
Tissue	27905	23934	6088	5223	6283	5336	53145	114.8
Paperboard, Total	2446972	789902	273650	94650	220828	84459	2875607	27.5
Solid Wood Pulp	2271161	712276	257411	87602	210312	78935	2704322	30.4
Total Linerboard	1644901	434515	187309	57162	149668	48517	1919951	27.9
Bleached Kraft Linerboard	179995	51186	14539	4893	14022	5005	184220	-4.2
Unbleached Kraft Linerbd	1464906	383330	172770	52268	135646	43512	1735731	32.6
Other Unbleached Kraft	100301	33739	21918	7304	6863	3020	173873	91.7
Other Bleached Kraft	508601	238813	46162	22491	53118	27112	595349	26.8
Semi-Chemical Corrugating	17358	5208	2023	646	662	286	15149	23.4
Recycled Paperboard	175811	77626	16238	7048	10517	5525	171285	-5.1
Wet Machine Board	7371	5146	802	619	727	418	7480	-17.0
Construction Paper & Bd. *	54642	25704	6552	2261	4730	2377	61921	4.9
Building Paper	34020	14420	2059	752	2025	970	27322	-28.1
Insulating Board E	20623	11284	4493	1509	2706	1408	34599	64.4
Convtd Paper&Paperbd Products	562343	585620	59506	61455	53500	63033	646272	20.9
Paper Products, Total	332256	427080	39104	46140	35083	47089	400685	31.8
Paperboard Products, Total	230087	158540	20402	15315	18417	15944	245587	6.6
Notes								
Other: No Weight Avail. ($000)		9803		892		854	11302	26.4
Total Exports Incl. Other($000)		3358212		405218		383134	4278461	47.0

* Hard Pressed Board (not in total)								
Imports of Hard Pressed Board	260775	39528	10625	2105	18437	3585	189982	-19.1
Exports of Hard Pressed Board	32030	11223	2478	836	2237	779	28164	-16.8

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1978	YEAR 1979	DEC. 1979	JAN. 1980	FEB. 1980	MARCH 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint	3489	3797	323	388	370	385	4574	26.6
Uncoated Groundwood Papers	1569	1674	135	122	112	126	1438	-14.2
Coated Papers	4513	4675	388	423	379	418	4881	6.4
Uncoated Free Sheet (1)	7315	7508	614	689	658	716	8251	12.1
Cotton Fiber Paper (1)	119	127	10	12	12	10	140	5.8
Thin Papers	350	376	28	31	29	28	357	-6.3
Bleached Bristols	1127	1114	90	97	96	92	1099	-0.2
Tissue Paper	4245	4310	328	377	353	375	4420	5.5
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3873	3923	304	342	344	345	4127	9.7
Other Paper (1)	1905	1791	159	173	158	165	1986	17.0
TOTAL PAPER GRADES	28505	29295	2378	2656	2501	2661	31272	9.7
PAPERBOARD								
Solid Wood Pulp Furnish	22500	22833	1765	2040	1921	2047	24032	8.5
Unbleached Kraft Linerboard	13215	13685	1039	1195	1134	1198	14104	4.9
Other Unbl. Kraft Paperboard	898	1014	61	92	84	108	1136	12.0
Bleached Kraft Paperboard	4002	3934	311	349	326	343	4073	12.3
Semi-Chemical Paperboard	4384	4200	354	405	377	399	4719	16.2
Recycled Paperboard	7534	7240	594	645	630	658	7735	6.4
TOTAL PAPERBOARD GRADES	30034	30073	2358	2685	2551	2706	31767	8.0
WET MACHINE BOARD	136	144	16	14	12	13	155	18.3
CONSTR. PAPER & INSUL. BOARD	3332	3322	230	237	245	244	2905	-12.6
TOTAL ALL GRADES [Excl. H.P.B.]*	62006	62834	4983	5591	5310	5624	66099	7.7

PRODUCER PRICE INDEXES

1967 = 100

	1978	1979	MARCH	APRIL	MAY	JUNE		
Pulp, Paper and Products	195.6	219.0	241.6	246.5	248.9	251.3	244.2	14.3
Pulp, Paper & Products, except Waste Paper ♦	195.6	219.2	241.9	246.6	249.3	251.1	244.3	14.9
Total Wood Pulp	266.5	314.3	359.0	386.8	388.0	388.0	372.5	24.4
Total Paper	206.1	229.6	250.5	253.6	256.5	258.3	251.9	12.5
Total Paper, exc. Newsprint	199.4	222.8	244.4	248.5	249.5	249.9	245.0	12.7
Newsprint	226.3	249.9	269.4	269.4	277.6	283.7	273.2	12.2
Total Paperboard	179.6	202.1	225.9	230.2	239.2	242.7	230.6	18.4
Total Paper and Paperboard ♦	197.8	220.9	242.8	246.3	251.1	253.4	245.3	14.2
Converted Products	186.5	209.9	231.3	234.6	236.1	239.3	233.1	14.4
Waste Paper	191.2	206.6	224.9	242.5	226.1	206.6	224.4	11.3
All Commodities	209.3	235.5	261.5	262.3	263.7	265.2	261.3	14.7
Industrial Commodities	209.4	236.4	268.2	270.7	271.2	273.0	268.3	18.2

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. ♦ Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

quarter 1980 total was about 4% below that of the first quarter of this year. Demand for paper for business held up well, with regular bond and form bond papers both showing strength. However, this was offset by weakness in demand for printing and publication grades.

Actual production of paperboard for exports, which accounts for about 9% of the total, rose by 12% from the first to second quarter. Production for domestic use dropped from 7.4 million tons in the first quarter to 7.1 million tons in the second quarter, for a decline of 4%.

The strongest market for paperboard was in the containerboard grades, as it has been all year. However, shipments of corrugated shipping containers, as reported by the Fibre Box Association, declined by 8% from the first to second quarters of the year. Fibre Box Association data also show that the cut-up of containerboard at fibre box mills declined by a similar amount. However, inventories of containerboard at mills and plants increased by 400,000 tons from the end of the first quarter to the end of the second quarter, acting as a prop to the paperboard demand. As of the end of the second quarter inventories amounted to 6.8 weeks of supply in terms of the relatively depressed level of usage in June, which forms the supply base for that calculation.

Production of bleached board was also bolstered by strength in exports. Total bleached board production declined by 3% from the first to second quarters of 1980, while production for export rose by 7%. Exports account for about 14% of the production total. Thus, production for domestic use declined by about 5% from the first to second quarters.

Exports account for only a negligible part of recycled paperboard production. Total recycled paperboard production ran about 5% below the year-ago level in the first half of 1980. Further, second quarter 1980 production was about 12% below the first quarter level.

Sales and Earnings

A compilation of reports on sales and earnings of 24 paper companies showed the effects of the slow down of business activity. Total sales, at $8.66 billion, were 6% above their year-ago level, while net income after taxes dropped by 15%. The margin on sales dropped from 7.5% in the second quarter of 1979 to 6.0% in the second quarter of 1980.

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A similar pattern was evident for the entire first half of 1980, with sales up 10% and earnings down 6.5%. These companies account for more than one-half of the total sales of paper and allied products corporations. The profit figures are adjusted for extraordinary charges and extraordinary income, so that they reflect the income earned on the sales of the company's products. The table below presents sales and earnings data for these companies for the second quarters of 1979 and 1980 and the first half of those years.

SALES AND EARNINGS

	Second Quarter			First Half		
	1980	1979	% Change	1980	1979	% Change
	Million	Dollars		Million	Dollars	
24 Companies						
Sales	8,663	8,181	+ 5.9%	17,401	15,773	+10.3%
Earnings	520	611	-14.9%	1,048	1,121	- 6.5%
Earnings as % of Sales	6.0%	7.5%		6.0%	7.1%	

Technical Note

The production data reported on page 3 and the Industry Fact and Data Sheets and discussed in this report are consistent with recent revisions made by the Printing/Writing Division and the Tissue Division. These Divisions re-surveyed their members in preparation for publication of their own annual statistical reports. As a result of these surveys, total production of printing and writing papers in 1979 is now reported at 15,368,000 tons, about 170,000 tons below the previously reported total. The reported total for tissue paper was reduced by about 30,000 tons. These revisions bring paper and paperboard production in 1979 to 64,555,000 tons, compared with 64,755,000 tons previously reported.

A2500-2

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

JULY 22, 1980

	PRODUCTION (000 TONS)					
	June 1980	May 1980	June 1979	Jan - June 1980	Jan - June 1979	% Change 80/79
PAPER GRADES	P	R				
Newsprint	386	405	337	2306	1966	17.3
Uncoated Groundwood (s)	131	132	127	770	741	3.9
Coated Paper (s)	372	380	353	2351	2236	5.1
Uncoated Free Sheet Paper (s)	666	682	683	4145	3889	6.6
Thin Paper (c)	28	30	32	174	193	-9.5
Cotton Fiber Paper (s)	10	10	10	65	64	2.3
Bleached Bristols (s)	86	89	82	522	514	1.4
Tissue Paper	340	376	386	2238	2263	-1.1
Unbleached Kraft Packaging & Indl. Converting (s)	305	325	336	1977	1987	-0.5
Other Paper (c)	145	155	154	947	880	N.C.
TOTAL PAPER	2469	2584	2499	15493	14731	5.2
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1258	1247	1191	7274	6917	5.2
Other Kraft Paperboard	84	96	108	556	652	-14.7
Semichemical Paperboard	401	414	402	2460	2353	4.6
Bleached Paperboard	314	343	335	1998	2040	-2.1
Recycled Paperboard	566	571	625	3661	3868	-5.3
TOTAL PAPERBOARD	2625	2670	2661	15950	15829	0.8
CONSTRUCTION & WET MACH GRADES(c)	236	252	303	1505	1771	-15.0
TOTAL PAPER AND PAPERBOARD	5330	5506	5462	32948	32331	1.9
HARD PRESSED BD.[not in total](c)	110	120	169	790	1050	-24.7

WOOD PULP (ALL GRADES)	May 1980	April 1980	May 1979	Jan - May 1980	Jan - May 1979	% Change 80/79
Dissolving & Special Alpha	138	134	139	676	577	17.1
Bleached Sulphite	127	119	127	607	535	13.5
Unbleached Sulphite	34	32	37	165	166	-0.6
Bleached & Semi-Bl. Sulph.	1672	1597	1579	8130	7456	9.0
Unbleached Sulphate	1732	1641	1708	8521	8268	3.1
Semichemical	351	345	362	1745	1669	4.6
Groundwood and Thermo-Mechanical	395	375	376	1886	1819	3.7
TOTAL PULP DIVISION DATA	4447	4243	4329	21730	20489	6.1
Defib. Exploded & Scrngs E	189	185	267	1001	1264	-20.8
TOTAL WOOD PULP PRODUCTION	4637	4428	4596	22730	21753	4.5

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments R - Revised E - Estimate NC - Not comparable
P - Preliminary (c) - Census Data - Production, last 2 months estimated.

July 30, 1980

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	Full Year		INDUSTRY DATA 1980			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1978	1979	April	May	June		
Total Production (API) ¦ ¦	62109R	64555R	5360	5506	5330	65896	1.9
Total Seasonally Adjusted ¦ excluding ¦			5267	5274	5365	64937	1.5
Imports (including Products) ¦hard pressed¦ E	9117	9125	765	774	770	9364	2.2
Exports (including Products) ¦ board ¦ E	3373	3672	407	357	380	4402	24.4
Apparent Consumption ¦ ¦	67854Ra	70008Rb	5625	5691	5755	69899c	0.4
Paper Production % Tonnage Capacity	93.2Rg	95.2Rg	93.8	92.2	90.7	95.2gh	-
Paperboard Production % Tonnage Capacity	92.8g	94.2g	91.2	90.7	92.5	93.3g	-
			March	April	May		
MARKET WOOD PULP PRODUCTION - Tons (000)	5126	5667	544	543	572	6544	24.2
TOTAL WOOD PULP PRODUCTION - Tons (000) (f)	47228	49743	4496	4243	4447	52151	6.1
WOOD PULP IMPORTS - TONS (000)	4025	4324	445	320	373	4395	-0.8
WOOD PULP EXPORTS - TONS (000)	2599	2935	321	360	317	3552	46.0
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			March	April	May		
Wood Pulp..(k)	47911	50156	4479	4103	4325	51273	2.5
Waste Paper....(d)	14760	15400	1286	1157	1185	14875	1.1
Other (Census) E	778	643	57	50	52	631	-7.1
Total	63449	66199	5821	5310	5562	66780	2.1
..WOOD PULP - NON PAPER E	884	909	73	70	73	868	-6.5
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	77290	79566	7044	6762	6811	81970	2.8
EMPLOYMENT (000)			April	May	June		
Paper and Allied Products Total RS	698.7	706.7	698.8	692.1	693.6	698.6	-0.7
Pulp, Paper and Board Mills Total E RS	267.4	271.7	268.8	267.7	268.2	269.6	0.1
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products	6.52	7.12	7.63	7.64	7.74	7.59	9.9
Pulp, Paper Mills E	7.44	8.26	8.87	8.84	8.90	8.80	10.6
Paperboard Mills E	7.68	8.38	9.07	9.01	9.05	8.95	10.4
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q4	1980 Q1	1980 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	3.46	4.88	5.23	5.91	5.97	6.04y	23.8
INDEX OF OUTPUT PER MAN-HOUR (1967=100)			April	May	June		
¦IN PULP, PAPER ¦...Production Workers RS	159.2	163.9	163.2	168.7	169.0	169.1	3.6
¦AND BOARD MILLS¦...All Employees RS	153.5	157.4	156.2	160.2	160.9	161.4	3.0
PAPER AND ALLIED PRODUCTS (Million $)			March	April	May		
Industry Shipments (Dept. of Commerce)*	57654	66033	5863	5834	5723	70426	9.4
Pulp, Paper and Paperboard*	25343	30165	2746	2758	2659	32876	13.2
Inventories (End of Period) - Total Industry*	5875	6779	7296	7416	7473	7473	18.7
Pulp, Paper and Paperboard*	2006	2321	2435	2533	2612	2612	24.4
			1979 Q3	1979 Q4	1980 Q1		
Sales (Corporations Only, FTC)	48982	55359	14133	14401	14682	58728	13.0
Earnings (Corporations Only, FTC)	2598	3724	1162	778	795	3180	-8.3
Depreciation (Corporations Only, FTC)	1726	1896	481	489	504	2016	12.8
Net Worth (Corporations Only, FTC)	20794	23206	22688	23206	24002	24002	12.8
PRICE INDEXES (Bureau of Labor Stats)1967=100			April	May	June		
Total Pulp, Paper and Allied Products	195.6	219.0	246.5	248.9	251.3	244.2	14.8
Wood Pulp	266.5	314.3	386.8	388.0	388.0	372.5	24.4
Waste Paper	191.2	206.6	242.5	226.1	206.6	224.4	11.3
Paper	206.1	229.6	253.6	256.5	258.3	251.9	12.5
Paperboard	179.6	202.1	230.2	239.2	242.7	230.6	18.4
PAPER DEMAND (INDEXED: 1967=100)			April	May	June		
Total Paper Production *	135.6R	141.7R	144.2	145.4	143.0	146.0	4.6
Paper New Supply *	132.9	137.2R	137.8	138.9	136.8	140.0	3.0
Total End - Use Index *	139.5	144.5	143.8	142.5	140.8	144.4	0.1
Production of Nondurable Goods *...(19%)	157.0	163.3	161.8	158.6	155.1	161.8	-0.2
Disposable Income (Constant $) *...(23%)	145.2	148.5	147.2	146.8	146.3	147.9	-0.4
Total Printing and Publishing *...(58%)	131.5	136.8	136.5	135.5	134.0	137.3	0.4
Trend Factor			-Not Available-				
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production *	132.8	137.9	132.0	131.3	138.7	137.4	0.4
Production for Domestic Use	131.1	135.5	128.8	125.8	130.1	132.5	-1.7
Total End - Use Index *	147.7	151.6	147.0	143.5	140.9	147.2	-3.2
Production of Consumer Goods *...(60.49%)	149.1	150.3	144.9	141.9	140.6	145.3	-4.0
Production of Equipment *...(6.62%)	132.8	142.1	145.2	143.8	141.2	144.6	2.5
Production of Materials *...(32.89%)	148.3	156.0	151.2	146.4	141.3	151.2	-2.8
Trend Factor			-Not Available-				
NEWSPRINT MARKETS			March	April	May		
Consumption by Publishers - Tons (000)	10872	11240	970	931	950	11029	-0.5
Newspaper Pub. and Printing Emp. Total (000) RS	408.1	423.0	431.2	430.9	431.2	431.2	3.2
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)	115090	117466	10605	10328	11034	114953	3.9
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	17586	19721	1799	1783	1744	21449	12.5
Inventories (End of Period)	1482	1695	1740	1768	1776	1776	15.2
Paper Only Sales	13078	14788	1354	1327	1320	15890	11.1
Inventories (End of Period)	1025	1141	1185	1201	1207	1207	15.0
RETAIL TRADE (Million $)			April	May	June		
Total Retail Sales *	799054	884407	75011	74265	75343	917224	6.5
Nondurable Goods Stores Sales *	518190	576882	52190	51728	52250	624452	12.0
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)*	146.1	152.1	148.3	144.7	141.2	148.5	-2.4
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100)	209.3	235.5	262.3	263.7	265.2	261.3	14.7
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)	195.4	217.4	242.5	244.9	247.6	240.7	14.4
			March	April	May		
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $)	275.6	311.3	307.6	306.1	303.8	303.8	5.7
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$)			1979 Q3	1979 Q4	1980 Q1		
G.N.P. or Expenditure - Current $	2127.6	2368.8	2396.5	2456.9	2520.8	2520.8	10.0
G.N.P. OR Expenditure - 1972 $	1399.2	1431.6	1433.3	1440.3	1444.7	1444.7	1.0

lb/capita	Popul.(mil)
.a - 621	218.7
.b - 635	220.6
.c - 630	222.0

.d - 1977 - 12103; 1978 - 12481
. 1979 12956;Jn-Mr'80A.R.12792
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1978 - 3,140; 1979 - 3,018; 1980 A.R.Y-T-D 2,402 (000 tons)
g - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '78 - 1,666; '79 - 1,593 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
* - Seasonally adjusted

MONTHLY STATISTICAL SUMMARY

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PAPER AND PAPERBOARD PRODUCTION IN A DECLINING TREND

Both paper and paperboard production have been following moderately declining trends since the early months of this year. Although shutdowns tend to distort the seasonal pattern to some extent, it appears that the seasonally adjusted rate of paper production was about 7% below the highs reached in the early months of the year, while paperboard production was down about 4%.

The production rates of both paper and paperboard were near record highs in the early months of this year. Thus, even with the inclusion of the recent declines, January-July 1980 paper production was 3% above its year-earlier level, while paperboard production matched its year-ago total. Major declines have occurred in the production of building paper and insulating board, which acted to tilt the trend of total paper and board production, including the building grades, in a steeper trend than indicated by the trends of paper and paperboard production alone. Total paper, paperboard and building paper and board production in the first seven months of 1980 was nonetheless about equal to the corresponding year-ago total.

Many sectors of the paper and paperboard industry continue to show strength. Newsprint production, in the first seven months of 1980 averaged

Continued on Page 2

Continued from Page 1

a record-high 4.6 million tons per year, with the seven month total some 17% over the year-earlier level. Total newsprint demand has held up fairly well and newsprint imports in the first half of 1980 were at a rate of 7.7 million tons per year, 6% above the first half 1979 rate. The increases in domestic production also reflected the impact of new mills that came on stream during the past year or so. While some of this gain reflected hedge buying in anticipation of strikes in Canadian mills, the domestic newsprint situation remains strong.

Production of total printing and writing papers in the January-July 1980 period was about 3% ahead of its year-earlier level. While the June-July 1980 rate of production was about 7% below the highs reached at the beginning of the year, the rate of incoming orders in July generally leveled out and in some cases moved upward. The backlog of unfilled orders in July for groundwood papers and uncoated free sheet papers held to the June level, while the backlog of coated paper orders showed a relatively strong increase.

Paperboard production in recent months has been strongly bolstered by record-high rates of production for export. In both June and July 1980 production for export exceeded 300,000 tons per month, for an annual rate of over 3.6 million tons per year, reflecting major gains in kraft linerboard exports. In 1979 production of paperboard for export was at a record-high 2.26 million tons.

Production of total containerboard for domestic use has been trending downward since the early months of this year, reflecting the declining trend in production of corrugated shipping containers. However, the annual rate of fibre box shipments in July as reported by the Fibre Box Associaton was the same as it was in June, after adjusting for normal seasonal factors. In addition, inventories of containerboard at box plants, which had been rising during the second quarter, leveled out in July at the June level. However, there was a small increase in containerboard inventories at paperboard mills.

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

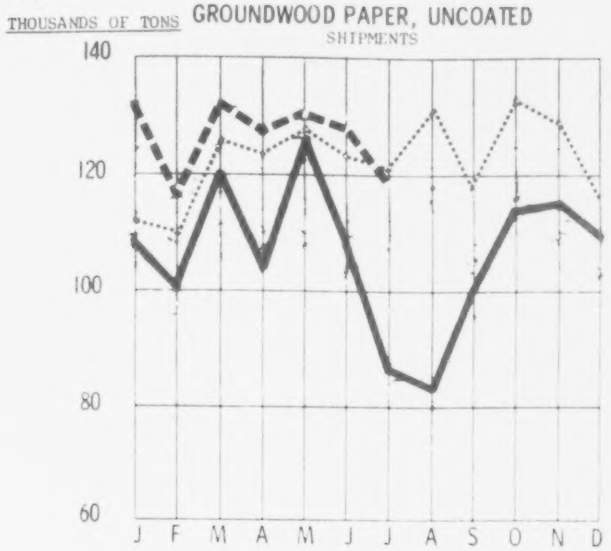
	YEAR 1978	YEAR 1979	APRIL 1980	MAY 1980	JUNE 1980	JULY 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint - Production	3768	4062	374	405	393	376	4609	17.0
- Shipments	3779	4066	382	402	382	375	4570	15.9
Printing & Writing	14596	15368	1322	1320	1253	1152	15673	3.2
Groundwood Paper - Shipments	1354	1509	127	132	127	118	1514	2.1
- New Orders	1414	1519	116	105	116	121	1498	-1.5
- Unfilled Orders	185	149	170	157	143	140	140	-13.6
Coated Paper - Shipments	4453	4527	377	380	364	345	4607	3.5
- New Orders	4432	4547	403	421	367	403	4863	7.1
- Unfilled Orders	404	513	405	435	430	481	481	1.9
Unctd Free Sheet - Shipments	7221	7813	684	682	648	577	8065	4.5
- New Orders	7538	7826	652	623	572	569	7659	-2.4
- Unfilled Orders	754	781	689	642	538	540	540	-32.8
Thin Paper - Production *	350	376	30	28	27	28	350	-7.8
Cotton Fiber Paper - Shipments	114	125	11	10	9	8	125	1.2
Bleached Bristols - Production	1103	1018	94	89	78	76	1011	-1.3
Tissue Paper - Production	4215	4506	372	376	341	320	4392	-2.7
Total Packaging & Other Paper	5789	5725	460	458	429	405	5577	-2.1
Unbl. Kraft Paper - Shipments	3884	3934	319	325	299	290	3861	-2.3
Other Paper - Production * #	1905	1791	141	133	130	115	1716	-1.5
TOTAL PAPER-Production-Unadj.	28367	29661	2527	2560	2416	2253	30250	3.1
-Production-S.A.			2512	2515	2443	2366	30098	2.6
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	22790	23838	1995	2098	2057	1916	24339	2.1
Unbl. Kraft Linerboard - Total	13228	13951	1168	1246	1258	1176	14478	4.8
Production for Export	1466	1645	147	177	221	242	2183	37.3
Other Unbl. Kraft Paperboard	1144	1200	93	96	84	69	1070	-16.5
Semichemical Paperboard	4439	4689	408	414	401	362	4838	2.9
Production for Export	119	98	9	8	28	30	188	86.4
Solid Bleached Paperboard	3979	3998	326	343	314	309	3953	-2.4
Production for Export	430	491	40	52	50	37	534	8.0
Recycled Paperboard	7485	7591	575	566	562	497	7071	-7.0
Production for Export	22	22	5	4	5	12	62	219.0
TOTAL PAPERBOARD-Prod.-Unadj.	30275	31429	2570	2664	2619	2414	31410	-0.1
- Containerboard Prod.(Dom. Use)	17908	18825	1576	1648	1565	1407	18858	1.0
- Boxboard Production (Dom. Use)	6505	5776	464	465	432	415	5560	-5.6
- All Other P'bd Prod.(Dom. Use)	3825	4571	330	310	318	271	4025	-14.1
- Total Paperbd Prod. for Export	2037	2257	201	241	304	321	2967	34.6
TOTAL PAPERBOARD PROD. - S.A.			2505	2492	2632	2493	31079	-0.6
WET MACHINE BOARD *	136	144	10	8	7	6	119	-5.1
BUILDING PAPERS *	1915	1900	117	99	95	95	1443	-25.1
INSULATING BOARD *	1416	1422	59	61	60	60	893	-37.6
TOTAL ALL GRADES - Unadjusted	62109	64555	5284	5391	5197	4828	64116	-0.2
- Production - S.A.			5194	5165	5233	5021	63646	-0.7
HARD PRESSED BD. [not in total]*	2294	2123	122	124	110	115	1562	-26.4

* Census Data - Production. Last two months estimated.
# Production excludes API bleached kraft envelope.
## Includes revisions not available monthly.
### Data for unbleached kraft folding boxboard for 1979 and 1980 included in All Other.

S.A. Seasonally Adjusted
P Preliminary
R Revised

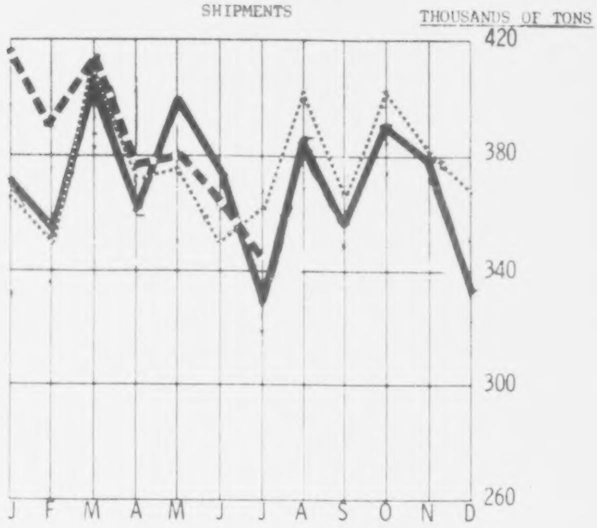
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



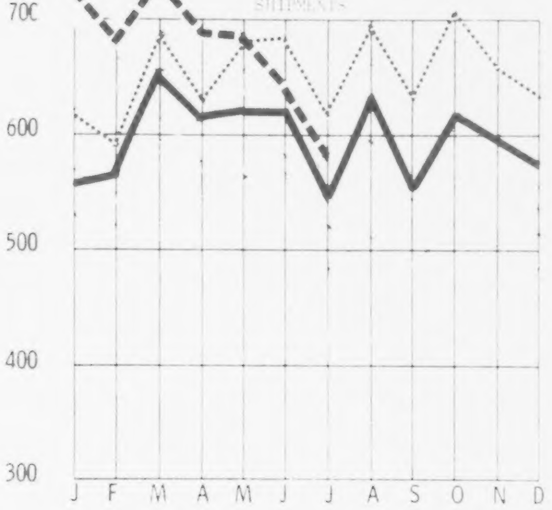
COATED PAPER

SHIPMENTS



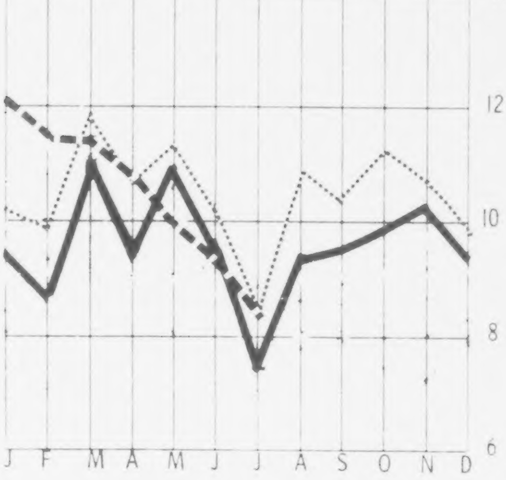
UNCOATED FREE SHEET PAPERS

SHIPMENTS



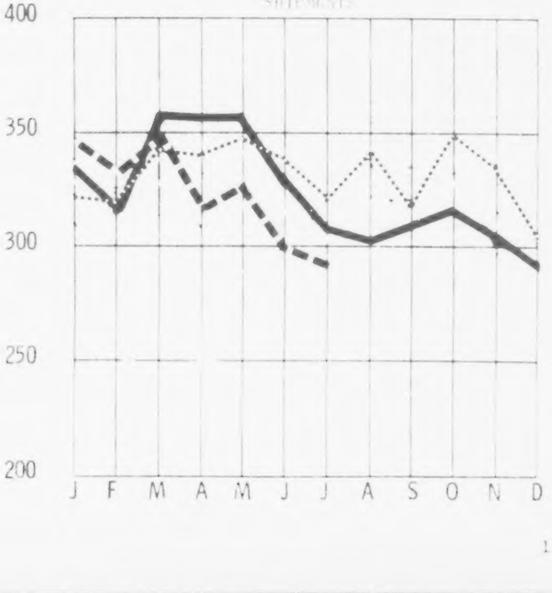
COTTON FIBER PAPER

SHIPMENTS



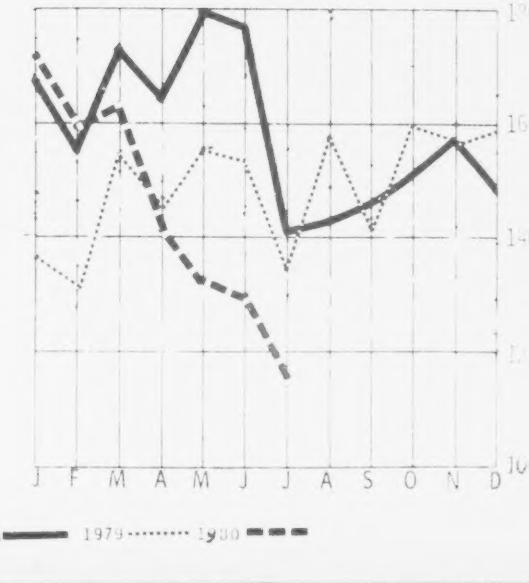
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1978 ——— 1979 ········ 1980 — — —

WOOD PULP STATISTICS
(Thousands of Tons)

	YEAR 1978	YEAR 1979	MARCH 1980	APRIL 1980	MAY 1980	JUNE 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
TOTAL WOOD PULP (1)					R	P		
Total Wood Pulp - Production	47228	49743	4496	4243	4447	4295	52047	5.0
- Imports	4025	4318	445	320	373	336	4334	-0.9
- Exports	2599	2935	321	360	317	362	3684	39.1
- New Supply	48653	51126	4621	4202	4502	4268	52697	2.8
Dissolving Pulp - Production	1411	1497	134	134	138	126	1603	12.4
- Imports	189	193	21	32	19	34	303	71.7
- Exports	758	764	91	84	58	79	820	22.1
- New Supply	842	926	63	81	99	81	1086	16.7
Paper Grades Chemical Pulp - Production	37893	39785	3604	3390	3564	3441	41727	5.0
- Imports	3627	3923	396	282	328	288	3841	-3.9
- Exports	1780	2100	220	268	254	270	2763	44.2
- New Supply	39740	41608	3780	3403	3637	3460	42804	2.4
Groundwood and Thermo-Mech. - Production	4141	4394	394	375	395	386	4544	4.2
- Imports	208	201	28	6	26	14	190	-5.4
- Exports	62	70	10	8	5	13	101	67.5
- New Supply	4287	4525	413	373	415	386	4632	2.9
Semi-Chemical - Production	3783	4068	365	345	351	342	4174	3.3
- Imports	0	0						
- Exports	0	0	------	Included	with	Groundwood	Pulp	------
- New Supply	3783	4068	365	345	351	342	4174	3.3
MARKET WOOD PULP								
Total Market Wood Pulp - Production	5126	5667	544	543	572	547	6548	21.7
- Imports	2816	3046	300	252	239	245	3101	-2.1
- Exports	2480	2784	301	298	287	321	3396	33.3
- New Supply	5462	5930	543	498	524	471	6253	4.2
Dissolving Pulp - Production	1406	1497	134	134	138	126	1600	12.0
- Imports	291	306	17	30	15	31	251	-28.6
- Exports	824	869	97	89	72	90	938	17.8
- New Supply	873	934	53	75	81	67	913	-7.2
Paper Grades Chemical Pulp - Production	3644	4107	403	403	428	415	4862	24.7
- Imports	2495	2734	279	222	223	214	2835	0.9
- Exports	1613	1870	202	202	213	225	2392	40.4
- New Supply	4525	4971	480	423	438	404	5305	6.0
Groundwood Pulp and All Other - Production	76	64	7	7	7	7	86	67.3
- Imports	26	7	5	0	1	0	15	146.7
- Exports	42	46	3	8	2	7	66	37.7
- New Supply	59	25	10	0	5	1	35	264.6

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1978 - 3,140; 1979 - 3,018; A.R.Y-T-D'80 - 2,170

SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

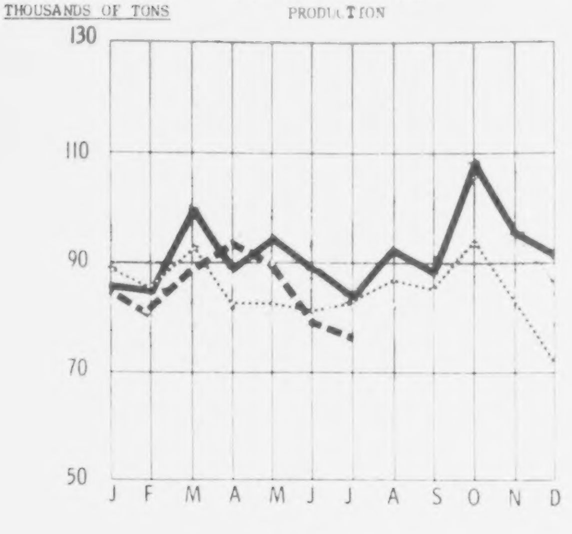
FIBROUS RAW MATERIALS
(Thousands of tons)

	1978	1979	MARCH 1980	APRIL 1980	MAY 1980	JUNE 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	63449	66199	5822	5281	5586	5288	66214	0.9
Total Wood Pulp (2) A	47911	50156	4480	4070	4352	4133	50982	1.5
Market Wood Pulp A	4774	5031	440	410	362	340	4818	-5.8
Waste Paper (3) A	14760	15400	1286	1157	1185	1109	14614	-0.6
Rags, Straw & Other C, E	778	643	57	53	49	46	618	-8.6
INVENTORIES								
Wood Pulp at Pulp Mills A	130	107	115	131	126	139	139	12.5
Market Pulp at Pulp Mills A	187	132	143	160	179	190	190	15.1
Mkt Pulp at Ppr.& Bd. Mills CE	435	426	447	471	482	490	490	8.4
Waste Ppr.at Ppr.&Bd. Mills (4)	740	798	756	818	786	822	822	0.5
Rags, Straw and Other at Paper and Board Mills C, E	66	61	57	57	58	55	55	-30.4
Mkt Wood Pulp Days of Supply A	44	38	39	43	53	55	55	35.7
Wood Pulp Consumption at at Non-Paper Mills C, E	884	909	73	70	68	65	843	-8.2

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.(000 tons): 1978 - 1,666; 1979 - 1,593
(3) Census Waste Paper Consumption, (000 tons): 1978 - 12,481; 1979 - 12,962; Jan-May 80 A.R. - 12,602
(4) Census data prior to 1979; more recent data are from the Paper Stock Conservation Committee, A.P.I.

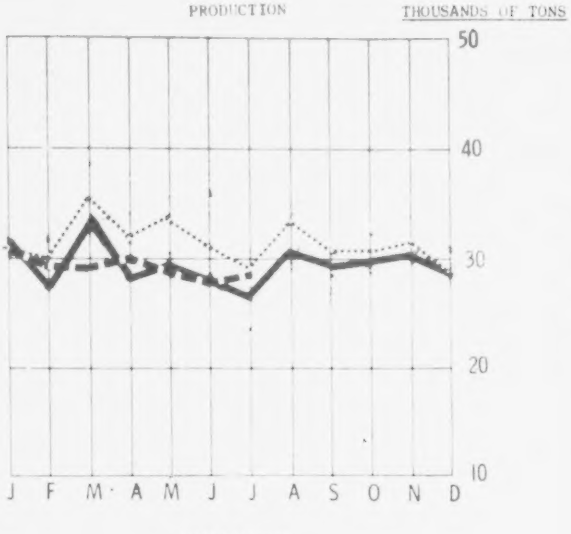
BLEACHED BRISTOLS

PRODUCTION



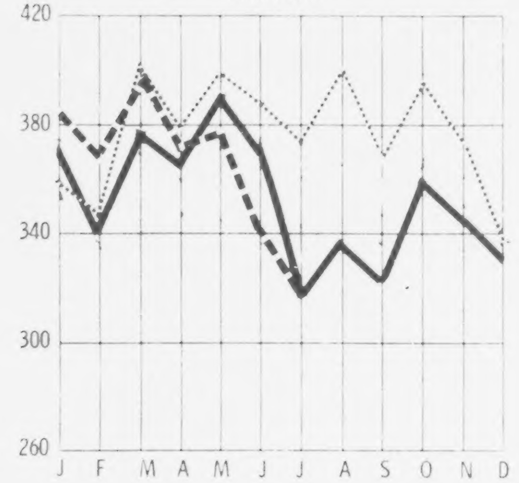
THIN PAPERS

PRODUCTION



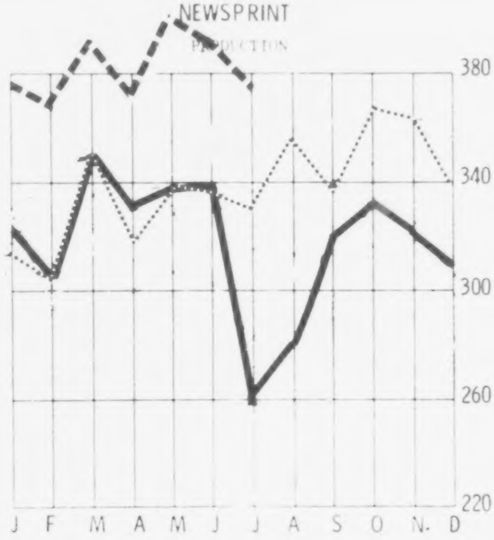
TISSUE PAPER

PRODUCTION



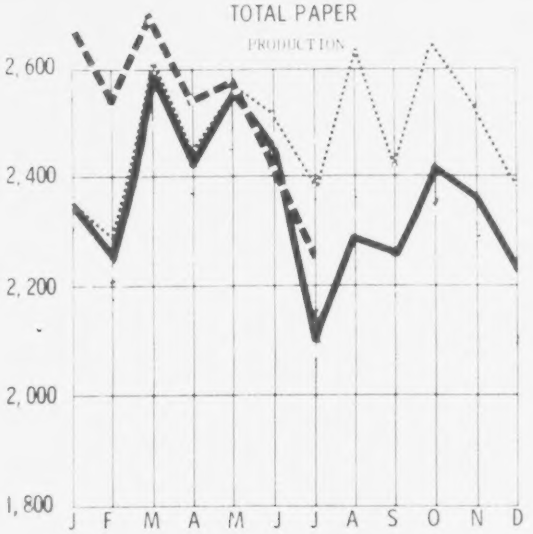
NEWSPRINT

PRODUCTION



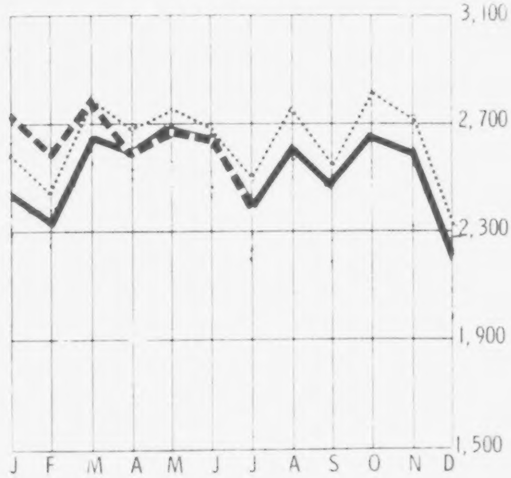
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1978 ▬▬ 1979 ······· 1980 ▬ ▬ ▬

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1978	YEAR 1979	MARCH 1980	APRIL 1980	MAY 1980	JUNE 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	77025	78625	6895	6677	6790	7365	83258	9.1
	- Total Consumpt.	77290	79566	7044	6762	6811	6969	82246	2.5
	- Residues *	30369	30015	2491	2294	2404	2651	29216	-3.0
	- Inventories	6244	5506	5555	5464	5425	5715	5715	24.3
So. Atlantic	- Total Receipts	25353	26126	2209	2274	2349	2426	27402	6.3
	- Total Consumpt	25204	26523	2388	2253	2267	2340	27606	4.1
	- Residues *	8513	8858	760	722	730	766	8804	-1.1
	- Inventories	1191	1052	823	850	958	1049	1049	14.9
Northeast	- Total Receipts	6664	7461	666	508	509	625	7760	5.8
	- Total Consumpt	6607	7584	682	659	622	611	7778	-0.5
	- Residues *	1662	1670	146	150	143	130	1682	-2.4
	- Inventories	770	674	865	706	587	598	598	3.5
South Central	- Total Receipts	25572	26654	2202	2220	2194	2439	27058	3.6
	- Total Consumpt	25678	26432	2289	2209	2335	2333	27224	0.5
	- Residues *	8418	8669	662	556	569	670	7676	-15.7
	- Inventories	1194	1472	1400	1404	1268	1347	1347	61.1
North Central	- Total Receipts	5291	5630	558	360	407	400	5986	16.1
	- Total Consumpt	5330	5535	449	448	461	441	5408	-6.2
	- Residues *	1456	1501	112	124	114	107	1416	-1.3
	- Inventories	968	993	1436	1325	1255	1214	1214	93.6
West	- Total Receipts	14145	12754	1260	1315	1331	1475	15052	26.1
	- Total Consumpt	14471	13492	1236	1193	1126	1244	14230	9.1
	- Residues *	10320	9317	811	742	848	978	9638	7.5
	- Inventories	2121	1315	1031	1179	1357	1507	1507	-8.4

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1979 Tons	YEAR 1979 $000	MAY 1980 Tons	MAY 1980 $000	JUNE 1980 Tons	JUNE 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206050	8867	8909	414	11083	677	180650	-2.9
Pulpwood Chips	1527734	30440	186997	4683	185039	4637	1793938	20.7
Wood Pulp, Total	4143944	1404354	346607	145691	316694	134561	4093332	-3.4
Waste Fibrous Materials, Total	104358	16281	10965	2228	8483	1513	129826	33.0
Paper,Paperboard&Products,Total	8501966	2779223	723864	268063	734166	270639	8864713	4.5
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8457803	2725085	718815	261820	729915	265160	8802172	4.3
Paper, Total	8015574	2642945	674096	253146	683696	256142	8225958	2.6
Newsprint	7077209	2249470	621990	227843	630254	229470	7536462	6.4
Printing,Writing & Rel.Pap.	799968	323175	45975	21685	47406	23112	598827	-24.0
Pack. & Ind. Conv. Paper	118815	57854	5464	3059	5627	3209	82661	-33.8
Special Industrial Paper	2544	2967	197	275	110	159	1382	-31.4
Tissue Paper	17039	9479	470	283	299	192	6626	-58.7
Paperboard, Total	80636	17653	11635	3264	9646	2714	116250	55.4
Wet Machine Board	1522	703	80	44	117	57	1620	0.4
Construction Paper and Bd. *	360071	63784	33004	5366	36456	6247	458344	31.3
Convtd Paper&Paperbd Products	44163	54138	5048	6243	4251	5479	62540	47.9

EXPORTS TO CANADA

	YEAR 1979 Tons	YEAR 1979 $000	MAY 1980 Tons	MAY 1980 $000	JUNE 1980 Tons	JUNE 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	263367	11446	9203	472	15448	862	150070	-57.9
Pulpwood Chips	87790	3790	2461	113	1993	81	25338	-73.9
Wood Pulp, Total	136641	49608	16897	5047	16984	4170	186854	47.0
Cotton Pulp & Other Pulp	7921	3728	2267	1129	573	322	13936	50.2
Waste Paper	478477	50207	44219	4801	36699	4174	538180	30.9
Paper,Paperboard&Products,Total	624928	353202	48090	32283	43313	30441	605822	-3.4
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Board *	454029	248403	34692	21864	30392	20478	433334	-6.6
Paper, Total	181451	142407	20163	15029	15811	13656	214945	20.6
Newsprint	2803	1734	152	128	143	115	1844	-47.9
Printing,Writing & Rel.Pap.	108290	76567	8495	7285	9340	7269	112063	3.1
Pack. & Ind. Conv. Paper	16084	10108	1235	857	1008	1048	15287	-2.8
Special Industrial Paper	46773	48173	9626	6266	4594	4566	79222	92.9
Tissue	7502	5825	655	494	726	658	6529	-29.3
Paperboard, Total	230904	83021	11434	5435	12388	5714	183393	-22.8
Wet Machine Board	5262	9916	373	209	356	201	4002	-30.8
Construction Pap. & Bd. E *	36411	13059	2721	1191	1838	907	30993	-26.7
Convtd Paper&Paperbd Products	170900	104799	13398	10419	12921	9964	172489	5.7

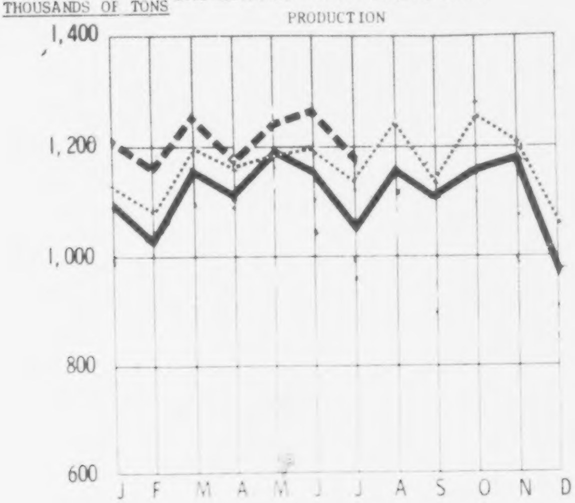
* - Hard Pressed Board (not in total)

Imports of Hard Pressed Bd.	29771	5370	2694	499	3352	596	39490	80.5
Exports of Hard Pressed Bd.	20535	6878	1500	501	1829	685	20000	-16.1

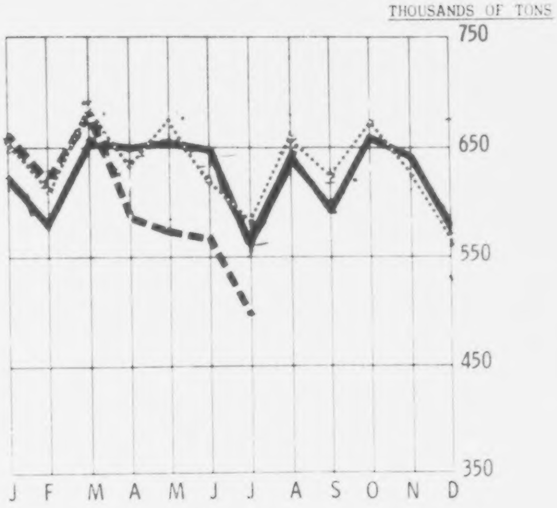
SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

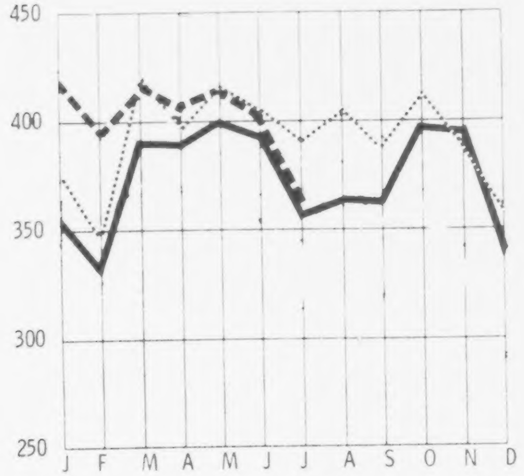


RECYCLED PAPERBOARD



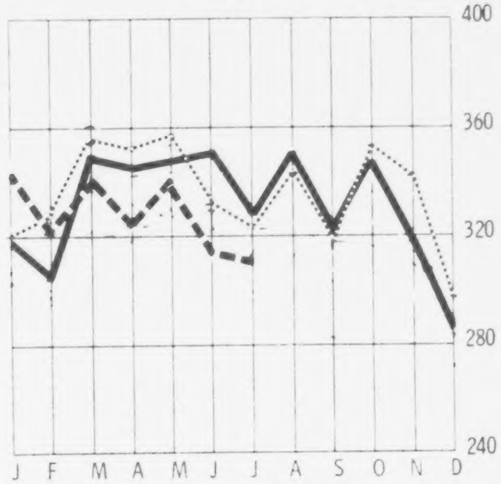
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



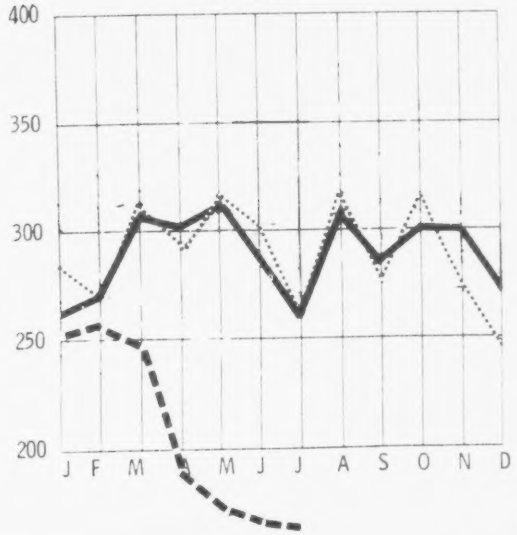
SOLID BLEACHED PAPERBOARD

PRODUCTION



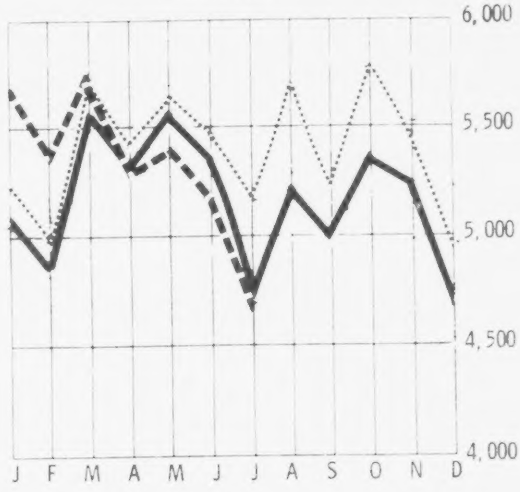
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1978 ▬▬ 1979 .... 1980 ▬ ▬ ▬

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1979 Tons	YEAR 1979 $000	MAY 1980 Tons	MAY 1980 $000	JUNE 1980 Tons	JUNE 1980 $000	(1) Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206074	8869	8912	414	11063	677	180616	-2.9
Pulpwood Chips	1574763	33413	186997	4683	185194	4639	1794272	13.5
Total All Imports	13562756	4697532	1152583	466688	1125394	446782	13811421	1.2
Wood Pulp, Total	4317522	1465169	372927	156463	335816	140787	4333730	-0.9
Waste Paper	78395	11189	2508	2747	6790	1313	51268	-26.7
Other Fibrous Materials	43640	13149	3204	1069	2615	1030	42354	-11.9
Paper,Paperbd&Products,Total	9123200	3208025	773944	306410	780174	303652	9384069	2.5
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9027147	2984896	764725	283280	771432	281033	9274394	2.3
Paper, Total	8559717	2896106	717694	274066	723157	271647	8670675	0.6
Newsprint	7222701	2300450	647834	238571	640660	233815	7693866	6.4
Printing & Writing	1178507	511722	63334	31232	76168	33919	878254	-27.7
Uncoated Groundwood	804596	295996	41889	17832	50859	18058	576670	-28.0
Uncoated Book	142674	69291	11445	6298	14243	7667	131589	-23.1
Coated Print.& Impres. Pap	188846	108590	8756	5166	9730	5886	144745	-29.4
Bristols	2247	1243	72	59	17	18	1684	-11.9
Writing and Similar Paper	25220	24547	667	1181	940	1849	16255	-32.9
Thin (except Cigarette)	14924	12057	506	697	379	441	7311	-41.6
Total Pkg & Other Paper	141196	74212	6055	3972	6024	3706	91648	-40.4
Unbleached Kraft Paper	66816	24551	3692	1646	2820	1223	38564	-49.7
Other Pkg. & Indust. Paper	74380	49661	2363	2326	3204	2483	53083	-31.3
Tissue	17312	9722	471	290	305	207	6907	-58.3
Paperboard, Total	82203	19111	11737	3413	9670	2735	117055	54.4
Test or Containerboard	25725	6021	5712	1620	5239	1443	56941	193.8
Semi-Chemical Corrugating	33494	5889	3648	739	2044	418	34099	-1.0
Other Paperboard	22984	7201	2378	1054	2387	875	26015	18.3
Wet Machine Board	2345	1341	129	77	154	98	2328	-7.3
Construction Paper & Bd. *	382883	68338	35166	5724	38452	6553	484337	31.2
Building Paper	330147	56768	32545	5086	35962	5989	446390	39.8
Insulating Board	21682	4664	1350	346	1477	341	16875	-26.1
Other Building Board	31054	6906	1271	292	1013	224	21072	-22.3
Convtd Paper&Paperbd Products	96053	223129	9219	23130	8742	22618	109675	19.2
Paper Products, Total	90246	211682	8543	21808	8184	21411	103507	18.9
Paperboard Products, Total	5807	11447	676	1322	556	1207	6168	23.9
Notes								
Other: No Weight Avail. ($000)		82849		6559		7366	73546	-8.8
Total Imports Incl. Other($000)		4780381		473247		454148	5429524	17.0

EXPORTS

	YEAR 1979 Tons	YEAR 1979 $000	MAY 1980 Tons	MAY 1980 $000	JUNE 1980 Tons	JUNE 1980 $000	(1)	
Pulpwood, Roundwood (in cords of 128 cu. ft.)	263721	11473	9303	476	16248	892	165540	-53.7
Pulpwood Chips	4498674	197847	451161	32279	439761	37889	4606122	10.6
Total All Exports	8971708	3348409	911453	382280	1080056	450721	11285432	34.2
Wood Pulp,Total	2934815	1103783	317312	132614	361990	157092	3683936	39.1
Cotton Pulp and Other Pulp	131444	74579	18100	10331	17683	11869	183540	35.6
Waste and Old Paper	2233246	256107	218878	27463	253399	35043	2882454	38.2
Paper, Paperbd&Products, Total	3672203	1913940	357163	211872	446983	246718	4535502	28.1
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	3109859	1328320	303663	148839	392294	179435	3887562	29.7
Paper, Total	600874	507569	77377	61584	63095	56187	774990	36.5
Newsprint	71456	32046	18977	8826	6715	3508	127659	143.4
Printing & Writing	274608	233371	22771	23108	28350	24735	292437	5.1
Uncoated Groundwood	80392	55384	6383	5019	10662	6970	82865	-0.8
Clay Coated Paper	73521	57743	6816	5943	6353	5380	81068	13.4
Uncoated Free Sheet	68159	64146	6252	7691	6922	7599	72744	3.9
Other Printing & Writing	52536	56098	3321	4456	4413	4787	55760	5.0
Total Pkg. & Other Paper	226906	218218	29347	24314	21619	21787	297784	42.0
Unbleached Kraft	63695	27079	9981	4408	9069	4032	115277	113.2
Other Pkg. & Indust. Paper	163211	191138	19366	19906	12550	17755	182507	17.3
Tissue	27905	23934	6283	5336	6411	6157	57110	107.8
Paperboard, Total	2446972	789902	220828	84459	323856	120362	3044052	28.8
Solid Wood Pulp	2271161	712276	210312	78935	307573	111592	2868747	31.6
Total Linerboard	1644901	434515	149668	48517	240620	78877	2081200	32.4
Bleached Kraft Linerboard	179995	51186	14022	5005	21018	7459	195554	0.9
Unbleached Kraft Linerbd	1464906	383330	135646	43512	219602	71418	1885646	36.8
Other Unbleached Kraft	100301	33739	6863	3020	14498	5866	173891	85.5
Other Bleached Kraft	508601	238813	53118	27112	49990	26067	596105	19.3
Semi-Chemical Corrugating	17358	5208	662	286	2464	781	17551	17.8
Recycled Paperboard	175811	77626	10517	5525	16284	8770	175305	-4.4
Wet Machine Board	7371	5146	727	418	570	412	7373	-12.8
Construction Paper & Bd. *	54642	25704	4730	2377	4773	2474	61148	4.5
Building Paper	34020	14420	2025	970	2997	1336	28762	-21.8
Insulating Board E	20623	11284	2706	1408	1776	1138	32385	49.2
Convtd Paper&Paperbd Products	562343	585620	53500	63033	54690	67283	647939	19.6
Paper Products, Total	332407	427080	35083	47089	35037	50331	403979	28.3
Paperboard Products, Total	229936	158540	18417	15944	19652	16952	243961	7.6
Notes								
Other: No Weight Avail. ($000)		9803		854		999	11417	53.2
Total Exports Incl. Other($000)		3358212		383134		451721	4468826	45.5

* Hard Pressed Board (not in total)

Imports of Hard Pressed Board	262229	39607	18437	3585	16143	2886	190604	-25.9
Exports of Hard Pressed Board	32030	11223	2237	779	2136	821	27742	-13.7

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1978	YEAR 1979	FEB. 1980	MARCH 1980	APRIL 1980	MAY 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
					R	P		
PAPER								
Newsprint	3489	3797	370	377	381	390	4576	24.4
Uncoated Groundwood Papers	1569	1674	112	126	122	126	1457	-12.5
Coated Papers	4513	4675	379	416	394	382	4784	3.5
Uncoated Free Sheet (1)	7315	7508	658	705	674	687	8193	10.0
Cotton Fiber Paper (1)	119	127	12	10	11	10	133	-0.2
Thin Papers	350	376	29	31	30	28	359	-7.1
Bleached Bristols	1127	1114	86	89	86	92	1078	-4.1
Tissue Paper	4245	4310	353	375	367	359	4392	2.3
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3873	3923	344	330	318	325	3983	4.0
Other Paper (1)	1905	1791	158	152	141	133	1815	4.1
TOTAL PAPER GRADES	28505	29295	2501	2609	2523	2541	30770	6.4
PAPERBOARD								
Solid Wood Pulp Furnish	22500	22833	1921	2101	1921	2023	24013	6.2
Unbleached Kraft Linerboard	13215	13685	1134	1258	1143	1204	14239	4.6
Other Unbl. Kraft Paperboard	898	1014	84	116	91	89	1130	8.9
Bleached Kraft Paperboard	4002	3934	326	343	327	327	4134	8.5
Semi-Chemical Paperboard	4384	4200	377	384	360	354	4509	8.8
Recycled Paperboard	7534	7240	630	647	576	547	7309	0.3
TOTAL PAPERBOARD GRADES	30034	30073	2551	2748	2497	2570	31322	4.0
WET MACHINE BOARD	136	144	12	13	10	8	136	3.7
CONSTR. PAPER & INSUL. BOARD	3332	3322	245	235	176	159	2527	-25.5
TOTAL ALL GRADES [Excl. H.P.B.]*	62006	62834	5310	5605	5207	5268	64754	3.9

PRODUCER PRICE INDEXES

1967 = 100

	1978	1979	APRIL	MAY	JUNE	JULY		
Pulp, Paper and Product	195.6	219.0	246.5	248.9	251.3	252.4	245.5	15.0
Pulp, Paper & Products, except Waste Paper ⧫	195.6	219.2	246.7	249.3	251.1	253.4	245.8	15.1
Total Wood Pulp	266.5	314.3	386.8	388.0	388.0	388.6	374.5	23.0
Total Paper	206.1	229.6	253.6	256.5	258.3	258.5	252.8	12.9
Total Paper, exc. Newsprint	199.4	222.8	248.5	249.5	249.9	250.1	245.7	[illegible]
Newsprint	226.3	249.9	269.4	277.6	283.7	283.7	274.7	12.6
Total Paperboard	179.6	202.1	230.2	239.2	242.7	237.5	231.8	18.4
Total Paper and Paperboard ⧫	197.8	220.9	246.3	251.1	253.4	251.9	246.2	14.3
Converted Products	186.5	209.9	234.6	236.1	239.3	242.4	234.7	14.0
Waste Paper	191.7	206.6	242.5	226.1	206.6	194.4	220.1	[illegible]
All Commodities	209.3	235.5	262.3	263.7	265.2	269.8	262.6	14.8
Industrial Commodities	209.4	236.4	270.7	271.2	273.0	275.6	269.4	17.9

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. ⧫ Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

Paper and paperboard production trends are consistent with trends in their end-use markets. For example, in home goods appliances, important markets for corrugated shipping containers, production moved sharply downward during the second quarter and showed a further decline in July. At the same time, production of non-durable goods, which include some of the largest markets for containerboard and boxboard, have been following a mildly declining trend during the past four months or so. Total economic activity, as measured by the gross national product, which fell at an annual rate of about 9% a year in the second quarter, appears to be moderating based upon the better performance of retail sales in recent months.

The construction grades of paper were, of course, affected by the extremely low levels of residential construction activity. The recent increases in housing starts give some promise of future increases in demand for these grades of paper and paperboard. There is some concern, however, that newly rising levels of interest rates may choke off the incipient increase in residential construction.

The table on page 3 shows that the average rate of production of total paper and paperboard and construction grades in the first seven months of 1980 was 63.6 million tons per year, only about 1-½% below the record high of 64.6 million tons produced in all of 1979. However, the June-July 1980 seasonally adjusted average rate of production was only 61.5 million tons per year. Even this rate compares favorably with the 62.1 million tons produced in the then record year of 1978.

New Supply

Imports of paper, paperboard and products fell 2% from the first to second quarters of 1980, while exports rose 15%. The rate of new supply (production plus imports less exports) of paper and board in the second quarter of 1980 was 66.8 million tons per year, 6% below the first quarter record high rate of 71.3 million tons per year, and 4.6% below the 1979 level.

Continued on Page 12

Continued from Page 11

The second quarter 1980 rate of total paper and paperboard new supply appears to have been a little below requirements by paper and paperboard consumers.

The ratio of paper and board new supply to total economic activity, as measured by the real gross national product, was 47.3 thousand tons per billion dollars of real GNP in the second quarter of 1980. During the four year period covering 1976 through 1979 the ratio of new supply of paper and paperboard to real GNP averaged 48.5 thousand tons per billion dollars. This suggests that at 48.5 thousand tons per billion dollars of real GNP, new supply is in balance with requirements of the final consumer. When adjustment is made for the build-up in newsprint inventories, the new supply in the second quarter may have been a little less than the indicated use.

Similarly, a comparison of new supply to production of non-durable consumer goods, a major market for paper and paperboard packaging, shows the average level of the ratio in the second quarter of 1980 about 4% below the average of this ratio for 1979 as a whole and 3% below the 1978 average.

[illegible]

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

AUGUST 25, 1980

	PRODUCTION (000 TONS)					
	July 1980	June 1980	July 1979	Jan - July 1980	Jan - July 1979	% Change 80/79
PAPER GRADES	P	R				
Newsprint	376	393	332	2688	2298	17.0
Uncoated Groundwood (s)	118	127	124	883	865	2.1
Coated Paper (s)	345	364	362	2688	2598	3.5
Uncoated Free Sheet Paper (s)	577	648	612	4705	4501	4.5
Thin Paper (c)	28	27	29	204	222	-7.8
Cotton Fiber Paper (s)	8	9	8	73	72	1.2
Bleached Bristols (s)	76	78	83	590	597	-1.3
Tissue Paper	320	341	371	2562	2634	-2.7
Unbleached Kraft Packaging & Indl. Converting (s)	290	299	319	2252	2305	-2.3
Other Paper (c)	115	130	137	1001	1017	-1.5
TOTAL PAPER	2253	2416	2377	17646	17108	3.1
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1176	1258	1139	8446	8056	4.8
Other Kraft Paperboard	69	84	95	624	747	-16.5
Semichemical Paperboard	362	401	389	2822	2742	2.9
Bleached Paperboard	309	314	323	2306	2363	-2.4
Recycled Paperboard	497	562	566	4125	4434	-7.0
TOTAL PAPERBOARD	2414	2619	2512	18323	18342	-0.1
CONSTRUCTION & WET MACH GRADES(c)	161	162	261	1432	2032	-29.5
TOTAL PAPER AND PAPERBOARD	4828	5197	5151	37401	37482	-0.2
HARD PRESSED BD.[not in total](c)	115	110	188	911	1238	-26.4

WOOD PULP (ALL GRADES)	June 1980	May 1980	June 1979	Jan - June 1980	Jan - June 1979	% Change 80/79
Dissolving & Special Alpha	126	138	136	801	713	12.4
Bleached Sulphite	122	127	121	729	655	11.3
Unbleached Sulphite	34	34	34	199	200	-0.7
Bleached & Semi-Bl. Sulph.	1558	1672	1531	9688	8987	7.8
Unbleached Sulphate	1727	1731	1755	10248	10023	2.2
Semichemical	342	351	352	2087	2020	3.3
Groundwood and Thermo-Mechanical	386	395	362	2272	2181	4.2
TOTAL PULP DIVISION DATA	4295	4447	4291	26024	24780	5.0
Defib. Exploded & Scrngs E	148	160	247	1085	1511	-28.2
TOTAL WOOD PULP PRODUCTION	4443	4607	4538	27109	26291	3.1

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments R - Revised E - Estimate NC - Not comparable
P - Preliminary (c) - Census Data - Production, last 2 months estimated.

August 29, 1980

	Full Year		INDUSTRY DATA 1980			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1978	1979	May	June	July		
Total Production (API)........ ...(excluding hard pressed board)	62109	64555	5391	5197	4828	64116	-0.2
Total Seasonally Adjusted.... ...			5165	5233	5021	63646	-0.7
Imports (including Products). ..E	9117	9123	774	780	775	9372	2.7
Exports (including Products). ..E	3373	3672	357	447	430	4625	30.7
Apparent Consumption......... ...	67854a	70006Rb	5581	5566	5366	68393c	-1.8
Paper Production % Tonnage Capacity...........	93.1Rg	95.2g	91.4	88.7	79.2	93.4gh	-
Paperboard Production % Tonnage Capacity......	92.8g	94.2g	90.7	92.5	81.6	92.0g	-
			April	May	June		
MARKET WOOD PULP PRODUCTION - Tons (000).........	5126	5667	543	572	547	6548	21.7
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	47228	49743	4243	4447	4295	52047	5.0
WOOD PULP IMPORTS - TONS (000)..................	4025	4318	320	373	336	4334	-0.9
WOOD PULP EXPORTS - TONS (000)..................	2599	2935	360	317	362	3684	39.1
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			April	May	June		
Wood Pulp..(k)..............................	47911	50156	4070	4352	4133	50982	1.5
Waste Paper....(d)..........................	14760	15400	1157	1185	1109	14614	-0.6
Other (Census)..............................E	778	643	53	49	46	618	-8.6
Total.................	63449	66199	5281	5586	5288	66214	0.9
..WOOD PULP - NON PAPER........................E	884	909	70	68	65	843	-8.2
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	77290	79566	6762	6811	6969	82246	2.5
EMPLOYMENT (000)			May	June	July		
Paper and Allied Products..........Total......	700.9	706.7	692.4	694.6	676.8	695.7	-1.2
Pulp, Paper and Board Mills........Total.....E	267.4	271.7	267.7	270.7	263.0	269.0	-0.5
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products......................	6.52	7.12	7.65	7.77	8.00	7.65	10.2
Pulp, Paper Mills...........................E	7.44	8.26	8.84	8.97	9.15	8.86	10.7
Paperboard Mills............................E	7.60	8.38	9.04	9.13	9.30	9.01	10.5
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1979 Q4	1980 Q1	1980 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	3.46	4.88	5.23	5.91	5.97	6.04y	23.8
INDEX OF OUTPUT PER MAN-HOUR (1967=100)..........			May	June	July		
IN PULP, PAPER ...Production Workers.......RS	159.2	163.9	165.9	164.2	163.2	166.8	2.4
AND BOARD MILLS...All Employees............RS	153.5	157.8	158.0	156.7	155.6	159.6	1.7
PAPER AND ALLIED PRODUCTS (Million $)			April	May	June		
Industry Shipments (Dept. of Commerce)*.......	57654	66033	5834	5649	5665	69870	8.2
Pulp, Paper and Paperboard*................	25343	30165	2758	2661	2747	32896	12.3
Inventories (End of Period) - Total Industry*.	5875	6779	7416	7479	7612	7612	20.0
Pulp, Paper and Paperboard*.................	2006	2321	2533	2604	2670	2670	27.8
			1979 Q3	1979 Q4	1980 Q1		
Sales (Corporations Only, FTC).................	48982	55359	14133	14401	14682	58728	13.0
Earnings (Corporations Only, FTC)..............	2598	3724	1162	778	795	3180	-8.3
Depreciation (Corporations Only, FTC)..........	1726	1896	481	489	504	2016	12.8
Net Worth (Corporations Only, FTC)............	20794	23206	22688	23206	24002	24002	12.8
PRICE INDEXES (Bureau of Labor Stats)1967=100			May	June	July		
Total Pulp, Paper and Allied Products..........	195.6	219.0	248.9	251.3	252.4	245.5	15.0
Wood Pulp......................................	266.5	314.3	388.0	388.0	388.6	374.5	23.8
Waste Paper....................................	191.2	206.6	226.1	206.6	194.4	220.1	8.7
Paper..	206.1	229.6	256.5	258.3	258.5	252.8	12.6
Paperboard.....................................	179.6	202.1	239.2	242.7	237.5	231.8	18.4
PAPER DEMAND (INDEXED: 1967=100)			May	June	July		
Total Paper Production *......................	135.6	141.7	144.1	140.0	135.6	143.7	2.6
Paper New Supply *...........................	132.9	137.2	137.8	135.5	132.0	138.4	1.6
Total End - Use Index *......................	139.5	144.5	142.0	140.6	139.8	143.7	-0.4
Production of Nondurable Goods *...(19%)..	157.0	163.3	157.9	154.1	151.2	160.1	-1.5
Disposable Income (Constant $) *...(23%)..	145.2	148.5	146.7	146.6	148.2	148.0	-0.4
Total Printing and Publishing *...(58%)..	131.5	136.8	135.0	133.8	132.7	136.6	-0.0
Trend Factor	----------------	----------------	----------------	-Not Available-	----------------	----------------	----------------
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production *................	132.8	137.9	131.1	138.4	131.1	136.2	-0.6
Production for Domestic Use	131.1	135.5	125.4	129.8	121.1	130.6	-3.2
Total End - Use Index *.....................	147.7	151.6	143.4	140.7	138.6	145.9	-4.1
Production of Consumer Goods *...(60.49%)	149.1	150.3	142.4	141.0	139.4	144.6	-4.4
Production of Equipment *...(6.62%)	132.8	142.1	143.9	141.5	139.9	144.0	2.0
Production of Materials *...(32.89%)	148.3	156.0	145.0	139.9	137.0	148.7	-4.6
Trend Factor	----------------	----------------	----------------	-Not Available-	----------------	----------------	----------------
NEWSPRINT MARKETS			April	May	June		
Consumption by Publishers - Tons (000)........	10872	11240	934	946	894	10977	-0.5
Newspaper Pub. and Printing Empl. Total(000)..	407.4	423.0	430.9	431.1	433.4	431.5	3.0
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	115090	116969	10328	11034	9308	114410	3.7
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	17586	19721	1783	1762	1731	21372	11.3
Inventories (End of Period)	1482	1695	1768	1777	1770	1770	9.5
Paper Only............................Sales	13078	14788	1327	1317	1284	15804	9.6
Inventories (End of Period)	1025	1141	1201	1196	1203	1203	10.4
RETAIL TRADE (Million $)			May	June	July		
Total Retail Sales *..........................	799054	884407	74587	75602	77125	919399	6.5
Nondurable Goods Stores Sales *..............	518190	576882	52050	52517	52935	627000	12.0
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)*.	146.1	152.1	144.3	141.0	138.8	147.0	-3.4
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	209.3	235.5	263.7	265.2	269.8	262.6	14.6
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	195.4	217.4	244.9	247.6	247.8	241.7	14.2
			April	May	June		
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	275.6	311.3	306.1	303.8	301.4	301.4	3.3
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1979 Q4	1980 Q1	1980 Q2		
G.N.P. or Expenditure - Current $.............	2127.6	2368.8	2456.9	2520.8	2524.6	2522.7	9.2
G.N.P. OR Expenditure - 1972 $................	1399.2	1431.6	1440.3	1444.7	1410.9	1427.8	0.1

lb/capita	Popul.(mil)
.a - 621	218.7
.b - 635	220.6
.c - 618	222.2

.d - 1977 - 12103; 1978 - 12481
. 1979 12956;Jn-My'80A.R.12602
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1978 - 3,140; 1979 - 3,018; 1980 A.R.Y-T-D 2,170 (000 tons)
g - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '78 - 1,666; '79 - 1,593 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
* - Seasonally adjusted

A2500 - 2A

MONTHLY STATISTICAL SUMMARY

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PAPER AND PAPERBOARD PRODUCTION LEVELS OFF

The decline in the production of paper and paperboard evident during the spring and early summer months appears to have leveled off in August at a rate a little above 60 million tons a year. This puts the drop from the first quarter high to the July-August level, on a seasonally adjusted basis, at about 9%. The August rate of production was above that of July, and estimates based on weekly data for the first three weeks of September suggest further gains in production, perhaps to the 62.5 million tons per year rate for that month.

Among the paper grades, the largest declines were evident in the packaging grades, where the July-August rate, on a seasonally adjusted basis, was down about 13%, and in the tissue grades, which showed a similar decline. The rate of printing paper production fell 8% in that period.

The rate of newsprint production was at record highs in the July-August period, about 9% above its first quarter level. Strength in domestic newsprint production, as noted in earlier reports, reflected the impact of new mills coming on stream during the past twelve months, together with the effect of strikes at newsprint mills in Canada. These strikes led newspapers to increase their inventories from 34 days of

Continued on page 2

Continued from page 1

supply at the end of 1979 to 45 days of supply as of the end of August 1980. The inventory increase amounted to about 350,000 tons in that eight month period, which brought the level of inventories back to where it was in mid-1978. The consumption of newsprint at newspapers, as estimated by the Canadian Pulp and Paper Association, held close to 1979's record high of 11 million tons throughout the first eight months of 1980.

Solid wood pulp paperboard production held up well throughout the spring and summer months, sustained by some inventory accumulation and a strong demand for exports. Recycled paperboard production, however, declined sharply; the rate in the July-August 1980 period was about 14% below that of the first quarter of the year.

Imports and Exports

Imports of newsprint held up well in the second quarter of 1980 in line with strong U.S. demand for this grade. Imports of printing/writing papers, on the other hand, showed a rather sharp decline during those months as did imports of packaging and other papers. For the entire first half of 1980, newsprint imports, at 7.7 million tons per year, showed a 6.4% gain over the year-ago total, but the declines in the imports of other paper held the gain in total imports of paper, paperboard and products to 2.5%.

In July 1980 imports of newsprint and of most other grades of paper and paperboard dropped sharply; the rate for all grades was under 8 million tons per year, compared to the 9.4 million tons per year rate of the first half of 1980. For the entire January-July period, imports of printing/writing grades were 31% below their year-ago level; imports of packaging and other types of paper were down 41%. The seven month newsprint total, however, was still 5% ahead of its year-ago level, which contributed to a modest gain in total imports of paper and paperboard over their year-ago rate.

A similar pattern was evident in imports of wood pulp. Imports of wood pulp averaged 361,000 tons a month in the first half of 1980, which was close to its year-ago level. In July wood pulp imports dropped to 285,000 tons, bringing the seven month total to a level 3% below that of the first seven months of 1979.

Exports of paper and paperboard remained strong throughout the first half of the year, and rose to a record-high level in July. Exports of paper, paperboard and products first crossed the 400,000

Continued on page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

	YEAR		MAY	JUNE	JULY	AUG.	Annual Rate Y-T-D	% Change from same Period Last Year
	1978	1979	1980	1980	1980	1980	1980	
PAPER					R	P		
Newsprint - Production	3768	4062	405	393	375	412	4650	16.8
- Shipments	3779	4066	402	382	385	405	4622	16.1
Printing & Writing	14596	15368	1320	1257	1156	1271	15630	2.0
Groundwood Paper - Shipments	1354	1509	132	127	115	124	1507	0.6
- New Orders	1414	1519	105	115	118	135	1505	-2.3
- Unfilled Orders	185	149	136	119	114	133	133	-18.6
Coated Paper - Shipments	4453	4527	380	364	340	384	4599	2.0
- New Orders	4432	4547	410	357	397	392	4741	3.7
- Unfilled Orders	404	385	360	344	387	418	418	5.7
Unctd Free Sheet - Shipments	7221	7813	682	650	590	645	8046	3.2
- New Orders	7538	7826	628	579	581	592	7652	-3.3
- Unfilled Orders	754	780	668	571	583	539	539	-33.7
Thin Paper - Production *	350	376	28	28	26	28	346	-9.3
Cotton Fiber Paper - Shipments	114	125	10	9	8	9	123	-1.0
Bleached Bristols - Production	1103	1018	89	78	78	81	1009	-1.7
Tissue Paper - Production	4215	4506	378	340	311	345	4354	-4.3
Total Packaging & Other Paper	5789	5725	460	425	392	425	5494	-4.0
Unbl. Kraft Paper - Shipments	3884	3934	325	299	282	300	3816	-3.6
Other Paper - Production * #	1905	1791	134	126	110	125	1678	-4.8
TOTAL PAPER-Production-Unadj.	28367	29661	2563	2414	2234	2453	30128	1.8
-Production-S.A.			2518	2441	2346	2395	29906	1.4
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	22790	23838	2095	2054	1913	2046	24326	1.5
Unbl. Kraft Linerboard - Total	13228	13951	1243	1253	1172	1251	14505	4.1
Production for Export	1466	1645	175	218	240	249	2264	40.3
Other Unbl. Kraft Paperboard	1144	1200	96	84	70	80	1056	-16.4
Semichemical Paperboard	4439	4689	414	401	362	387	4814	2.0
Production for Export	119	98	8	28	30	35	218	108.4
Solid Bleached Paperboard	3979	3998	343	314	309	328	3952	-2.4
Production for Export	430	491	52	50	36	54	549	11.0
Recycled Paperboard	7485	7591	566	562	498	566	7039	-7.9
Production for Export	22	22	5	5	12	11	72	270.0
TOTAL PAPERBOARD-Prod.-Unadj.	30275	31429	2661	2615	2410	2612	31365	-0.8
- Containerboard Prod.(Dom. Use)	17908	18825	1646	1564	1405	1503	18736	-0.4
- Boxboard Production (Dom. Use)	6505	5776	465	432	415	446	5538	-5.9
- All Other P'bd Prod.(Dom. Use)	3825	4571	310	318	271	314	3989	-14.6
- Total Paperbd Prod. for Export	2037	2257	240	302	319	349	3103	39.0
TOTAL PAPERBOARD PROD. - S.A.			2489	2629	2490	2475	30871	-1.1
WET MACHINE BOARD *	136	144	8	9	8	9	124	-3.7
BUILDING PAPERS *	1915	1900	97	93	90	95	1391	-28.2
INSULATING BOARD *	1416	1422	63	73	70	75	933	-35.9
TOTAL ALL GRADES - Unadjusted	62109	64555	5391	5205	4812	5243	63941	-1.2
- Production - S.A.			5165	5241	5004	5041	63225	-1.5
HARD PRESSED BD. [not in total]*	2294	2123	124	131	140	145	1654	-23.0

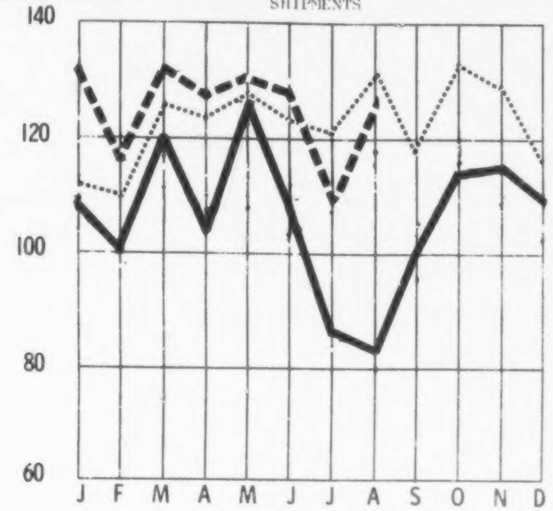
* Census Data - Production. Last two months estimated.
# Production excludes API bleached kraft envelope.
## Includes revisions not available monthly.
### Data for unbleached kraft folding boxboard for 1979 and 1980 included in All Other.

S.A. Seasonally Adjusted
P Preliminary
R Revised

THOUSANDS OF TONS

GROUNDWOOD PAPER, UNCOATED

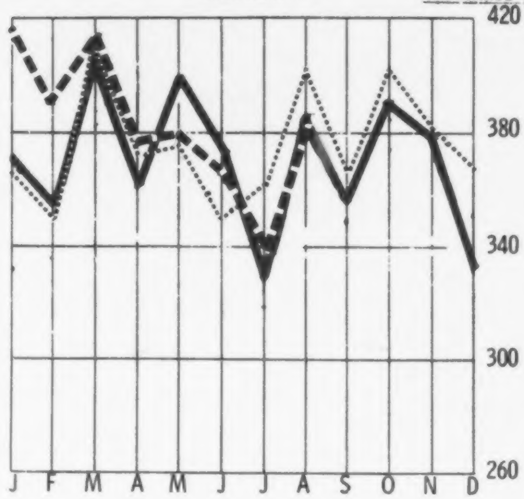
SHIPMENTS



COATED PAPER

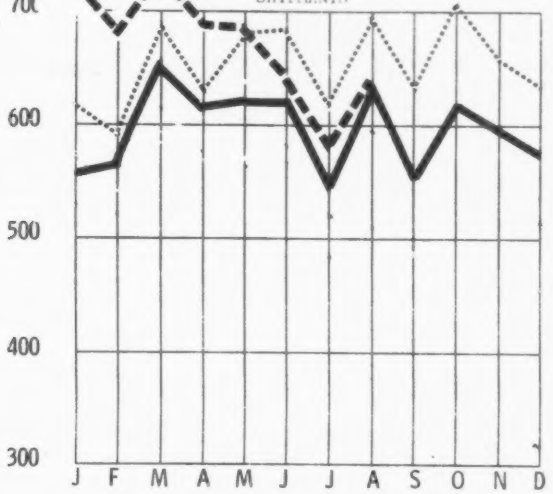
SHIPMENTS

THOUSANDS OF TONS



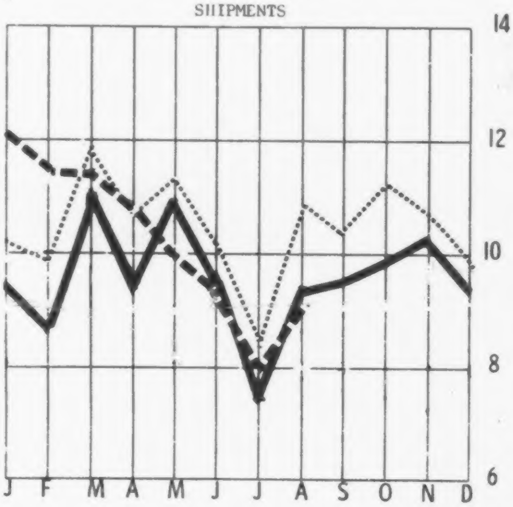
UNCOATED FREE SHEET PAPERS

SHIPMENTS



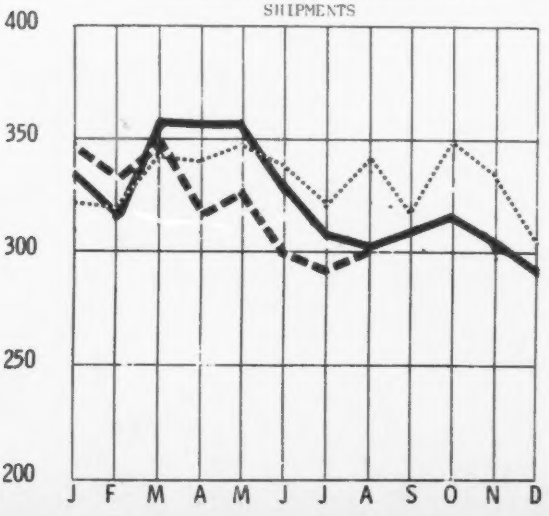
COTTON FIBER PAPER

SHIPMENTS



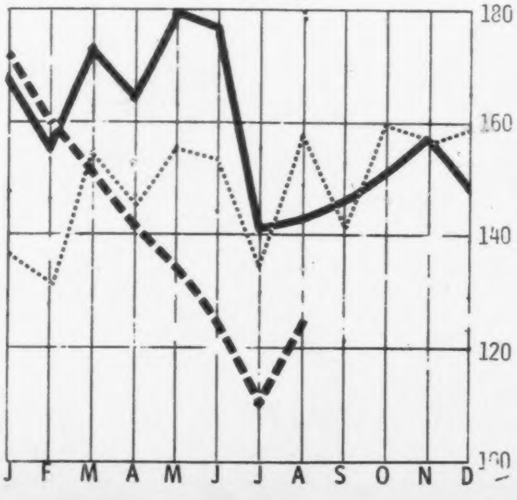
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1978 ▬▬ 1979 ······· 1980 ▬ ▬ ▬

WOOD PULP STATISTICS

(Thousands of Tons)

	YEAR		APRIL	MAY	JUNE	JULY	Annual Rate Y-T-D	% Change from same Period Last Year
	1978	1979	1980	1980	1980	1980	1980	
TOTAL WOOD PULP (1)					R	P		
Total Wood Pulp - Production	47228	49743	4237	4447	4307	3977	51436	4.1
- Imports	4025	4318	320	373	336	285	4204	-3.4
- Exports	2599	2935	360	317	362	356	3769	37.1
- New Supply	48653	51126	4197	4502	4281	3906	51871	1.7
Dissolving Pulp - Production	1411	1497	134	138	126	111	1564	8.9
- Imports	189	193	32	19	34	12	281	66.2
- Exports	758	764	84	58	79	73	828	13.9
- New Supply	842	926	81	99	81	51	1018	15.8
Paper Grades - Production	37893	39785	3384	3564	3453	3194	41247	4.2
Chemical Pulp - Imports	3627	3923	282	328	288	267	3750	-5.8
- Exports	1780	2100	268	254	270	279	2847	45.1
- New Supply	39740	41608	3398	3637	3472	3182	42150	1.3
Groundwood and - Production	4141	4394	375	395	386	366	4522	4.1
Thermo-Mech. - Imports	208	201	6	26	14	6	172	-13.4
- Exports	62	70	8	5	13	4	94	58.0
- New Supply	4287	4525	373	415	386	368	4601	2.6
Semi-Chemical - Production	3783	4068	345	351	342	306	4102	1.7
- Imports	0	0						
- Exports	0	0	------	Included	with	Groundwood	Pulp	------
- New Supply	3783	4068	345	351	342	306	4102	1.7
MARKET WOOD PULP								
Total Market - Production	5126	5667	543	572	547	542	6541	20.3
Wood Pulp - Imports	2816	3046	252	239	245	202	3004	-4.3
- Exports	2480	2784	298	287	321	296	3418	31.4
- New Supply	5462	5930	498	524	470	448	6127	2.5
Dissolving Pulp - Production	1406	1497	134	138	126	108	1556	8.2
- Imports	291	306	30	15	31	11	233	-30.1
- Exports	824	869	89	72	90	65	915	15.2
- New Supply	873	934	75	81	67	54	875	-10.6
Paper Grades - Production	3644	4107	403	428	414	429	4902	24.2
Chemical Pulp - Imports	2495	2734	222	223	214	191	2758	-1.5
- Exports	1613	1870	202	213	225	229	2444	38.8
- New Supply	4525	4971	423	438	403	391	5216	4.7
Groundwood Pulp - Production	76	64	7	7	7	6	83	52.5
and All Other - Imports	26	7	0	1	0	0	13	114.3
- Exports	42	46	8	2	7	2	59	27.7
- New Supply	59	25	0	5	0	4	37	161.0

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1978 - 3,140; 1979 - 3,018; A.R.Y-T-D'80 - 2,222

SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

FIBROUS RAW MATERIALS

(Thousands of tons)

CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	63449	66199	5281	5585	5326	4854	65140	-0.1
Total Wood Pulp (2) A	47911	50156	4070	4351	4174	3780	50247	0.5
Market Wood Pulp A	4774	5031	410	361	375	350	4788	-5.8
Waste Paper (3) A	14760	15400	1157	1185	1109	1034	14299	-1.5
Rags, Straw & Other C, E	778	643	53	49	43	40	593	-9.7
INVENTORIES								
Wood Pulp at Pulp Mills A	130	107	131	126	141	117	117	0.9
Market Pulp at Pulp Mills A	187	132	160	179	190	0	0	0.0
Mkt Pulp at Ppr.& Bd, Mills CE	435	426	471	485	462	520	520	18.3
Waste Ppr.at Ppr.&Bd. Mills (4)	740	798	818	786	822	934	934	11.7
Rags, Straw and Other at Paper and Board Mills C, E	66	61	57	58	59	65	65	-5.8
Mkt Wood Pulp Days of Supply A	44	38	43	53	48	43	43	4.2
Wood Pulp Consumption at at Non-Paper Mills C, E	884	909	70	68	70	65	843	-8.2

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons

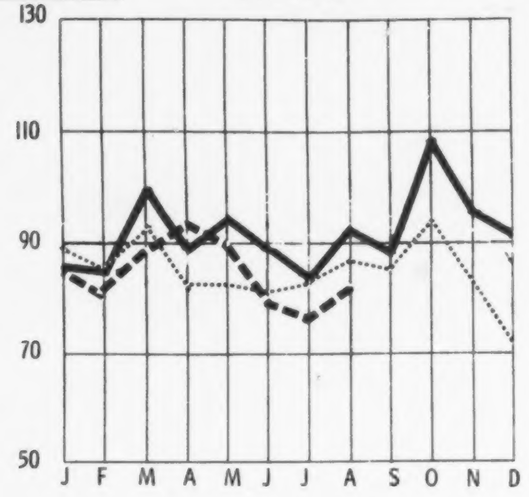
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.(000 tons): 1978 - 1,666; 1979 - 1,593

(3) Census Waste Paper Consumption, (000 tons): 1978 - 12,481; 1979 - 12,962; Jan-Jun '80 A.R. - 12,702

(4) Census data prior to 1979; more recent data are from the Paper Stock Conservation Committee, A.P.I.

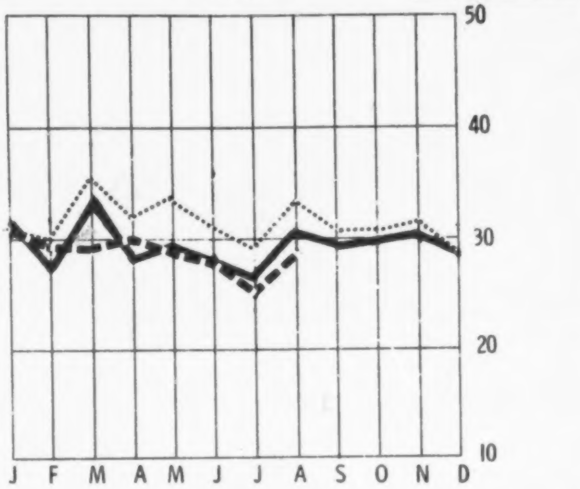
BLEACHED BRISTOLS

PRODUCTION



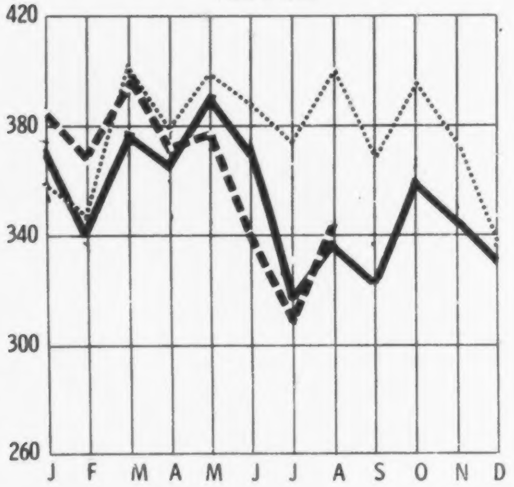
THIN PAPERS

PRODUCTION



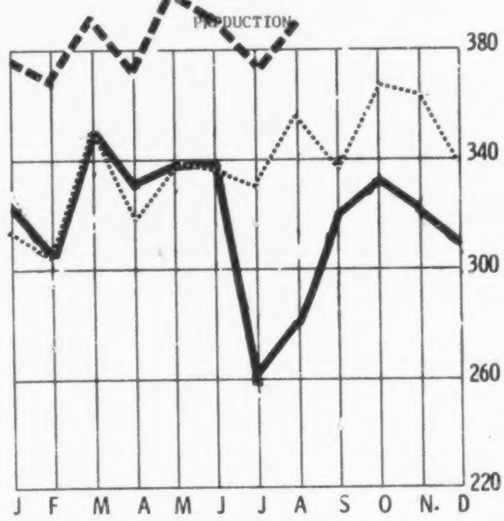
TISSUE PAPER

PRODUCTION



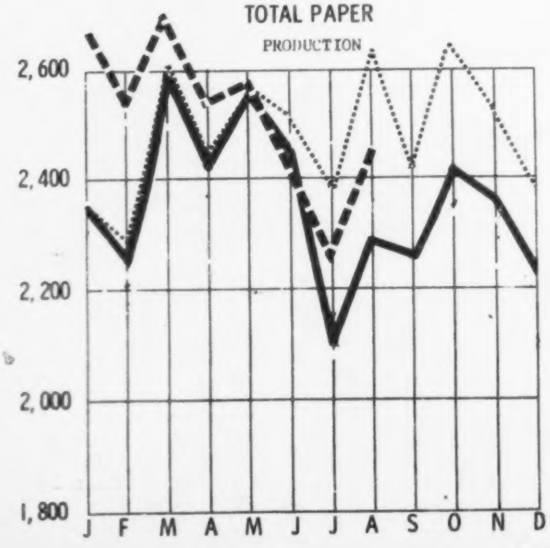
NEWSPRINT

PRODUCTION



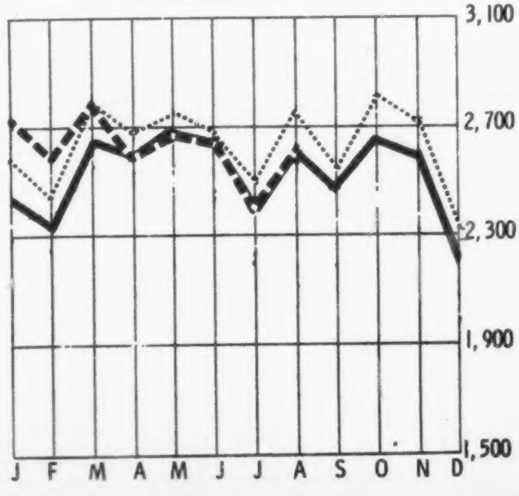
TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION



1978 ━━━ 1979 ········ 1980 ▬ ▬ ▬

FIBROUS RAW MATERIALS (Continued)
(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1978	YEAR 1979	APRIL 1980	MAY 1980	JUNE 1980	JULY 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	77025	78625	6677	6790	7365	6782	82990	8.4
	- Total Consumpt.	77290	79566	6762	6811	6969	6356	81393	1.9
	- Residues *	30369	30015	2294	2404	2651	2433	29213	-2.5
	- Inventories	6244	5506	5464	5425	5715	6114	6114	34.1
So. Atlantic	- Total Receipts	25353	26126	2274	2349	2426	2293	27418	5.8
	- Total Consumpt	25204	26523	2253	2267	2340	2196	27427	2.5
	- Residues *	8513	8858	722	730	766	745	8823	-0.9
	- Inventories	1191	1052	850	958	1049	1182	1182	37.6
Northeast	- Total Receipts	6664	7461	508	509	625	572	7632	4.4
	- Total Consumpt	6607	7584	659	622	611	493	7512	-1.9
	- Residues *	1662	1670	150	143	130	113	1635	-2.7
	- Inventories	770	674	706	587	598	665	665	11.4
South Central	- Total Receipts	25572	26654	2220	2194	2439	2298	27132	4.2
	- Total Consumpt	25678	26432	2209	2335	2333	2201	27108	1.1
	- Residues *	8418	8669	556	569	670	655	7702	-13.9
	- Inventories	1194	1472	1404	1268	1347	1456	1456	85.0
North Central	- Total Receipts	5291	5630	360	407	400	409	5832	10.7
	- Total Consumpt	5330	5535	448	461	441	378	5283	-6.4
	- Residues *	1456	1501	124	114	107	113	1407	-3.1
	- Inventories	968	993	1325	1255	1214	1221	1221	72.2
West	- Total Receipts	14145	12754	1315	1331	1475	1210	14976	24.6
	- Total Consumpt	14471	13492	1193	1126	1244	1088	14062	8.3
	- Residues *	10320	9317	742	848	978	807	9645	7.3
	- Inventories	2121	1315	1179	1357	1507	1590	1590	-1.0

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1979 Tons	YEAR 1979 $000	JUNE 1980 Tons	JUNE 1980 $000	JULY 1980 Tons	JULY 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206050	8867	11083	677	17239	556	184395	2.6
Pulpwood Chips	1527734	30440	185039	4637	146749	3885	1789231	22.4
Wood Pulp, Total	4143944	1404354	316694	134561	276644	120412	3982817	-4.9
Waste Fibrous Materials, Total	104358	16281	8483	1513	11112	2019	130329	34.5
Paper,Paperboard&Products,Total	8501966	2779223	734166	270639	631839	235738	8681477	2.9
Paper, Paperboard,Wet Machine Bd & Constr. Paper & Bd. *	8457803	2725085	729915	265160	628459	231205	8622078	2.7
Paper, Total	8015574	2642945	683696	256142	580907	222672	8046662	1.0
Newsprint	7077209	2249470	630254	229470	539628	201638	7384901	5.0
Printing,Writing & Rel.Pap.	799968	323175	47406	23112	35712	17605	574502	-27.2
Pack. & Ind. Conv. Paper	118815	57854	5627	3209	5393	3262	80097	-34.5
Special Industrial Paper	2544	2967	110	159	70	96	1304	-44.2
Tissue Paper	17039	9479	299	192	105	71	5859	-65.8
Paperboard, Total	80636	17653	9646	2714	6606	1831	110967	50.2
Wet Machine Board	1522	703	117	57	110	65	1576	-4.4
Construction Paper and Bd. *	360071	63784	36456	6247	40837	6637	462873	30.5
Convtd Paper&Paperbd Products	44163	54138	4251	5479	3380	4533	59399	36.7

EXPORTS TO CANADA

	YEAR 1979 Tons	YEAR 1979 $000	JUNE 1980 Tons	JUNE 1980 $000	JULY 1980 Tons	JULY 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	263367	11446	15448	862	9868	583	145548	-55.8
Pulpwood Chips	87790	3790	1993	81	1036	53	23494	-76.4
Wood Pulp, Total	136641	49608	16984	4170	11673	5158	180171	41.5
Cotton Pulp & Other Pulp	7921	3728	573	322	811	472	13335	54.2
Waste Paper	478477	50207	36699	4174	27943	3191	509199	20.2
Paper,Paperboard&Products,Total	624928	353202	43313	30441	38325	26625	584976	-5.0
Paper, Paperboard, Wet Machine Bd & Constr. Paper & Board *	454029	248403	30392	20478	28094	18035	419589	-6.9
Paper, Total	181451	142407	15811	13656	16710	12754	212884	24.0
Newsprint	2803	1734	143	115	167	167	1867	-46.2
Printing,Writing & Rel.Pap.	108290	76567	9340	7269	9595	6233	112502	7.3
Pack. & Ind. Conv. Paper	16084	10108	1008	1048	700	603	14303	-8.1
Special Industrial Paper	46773	48173	4594	4566	5638	5284	77570	100.3
Tissue	7502	5825	726	658	610	468	6642	-26.3
Paperboard, Total	230904	83021	12388	5714	9750	4416	173909	-25.2
Wet Machine Board	5262	9916	356	201	231	169	3825	-29.9
Construction Pap. & Bd. E *	36411	13059	1838	907	1403	697	28971	-29.9
Convtd Paper&Paperbd Products	170900	104799	12921	9964	10231	8590	165387	0.1

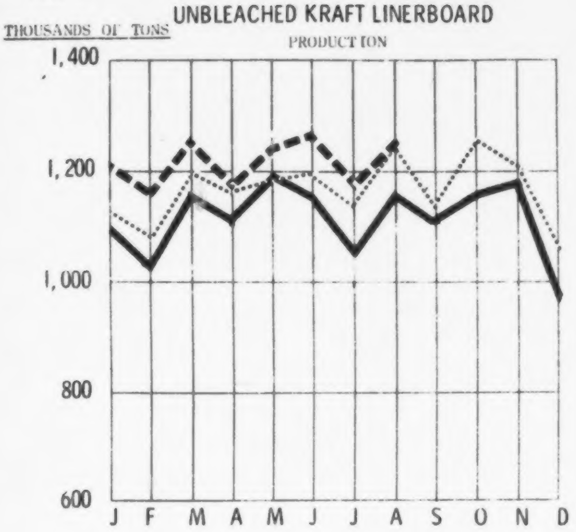
* - Hard Pressed Board (not in total)

Imports of Hard Pressed Bd.	29771	5370	3352	596	3320	665	39540	86.7
Exports of Hard Pressed Bd.	20535	6878	1829	685	1365	428	19483	-13.3

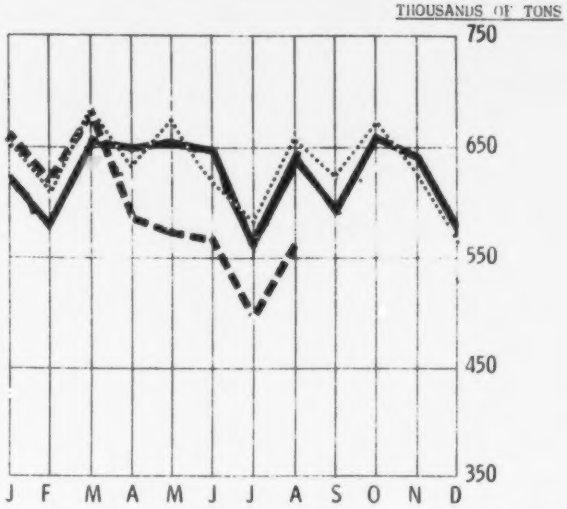
SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

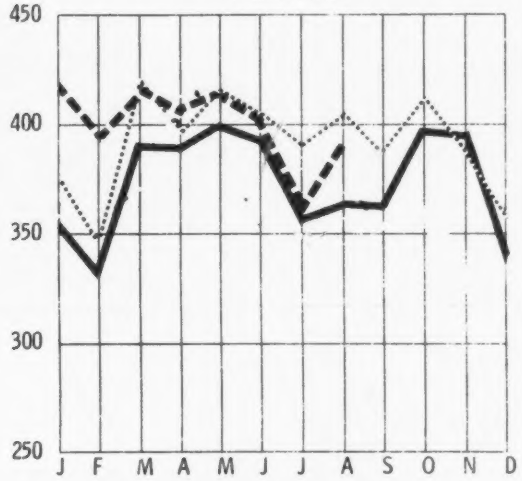


RECYCLED PAPERBOARD



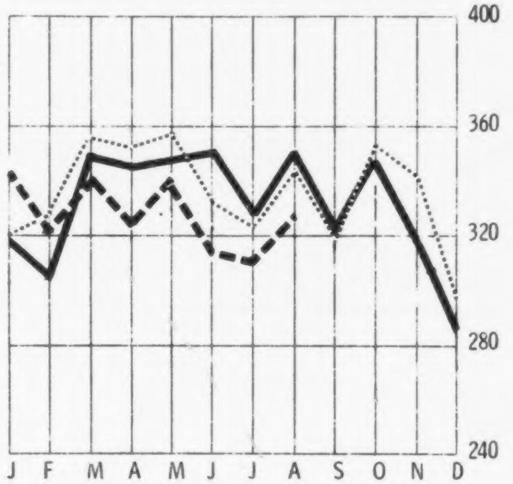
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



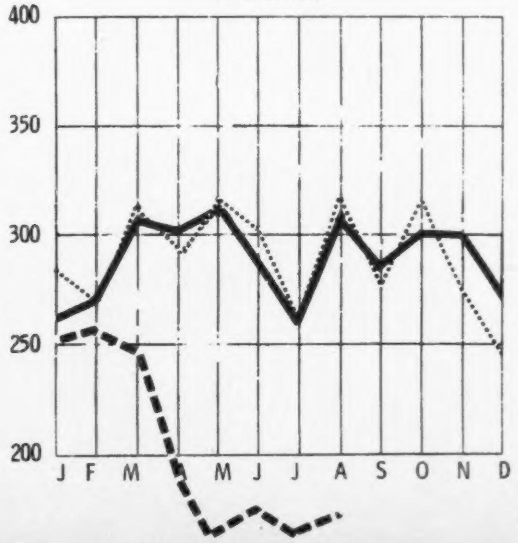
SOLID BLEACHED PAPERBOARD

PRODUCTION



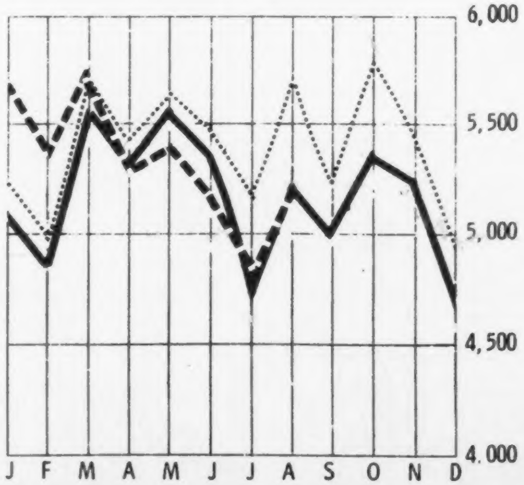
WET MACHINE BOARD AND BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1978 ▬▬ 1979 .... 1980 ▬ ▬ ▬

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1979 Tons	YEAR 1979 $000	JUNE 1980 Tons	JUNE 1980 $000	JULY 1980 Tons	JULY 1980 $000	(1) Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206074	8869	11063	677	17239	556	184366	2.6
Pulpwood Chips	1574763	33413	185194	4639	146749	3885	1789517	16.0
Total All Imports	13562756	4697532	1125394	446782	960997	391873	13525219	-0.5
Wood Pulp, Total	4317522	1465169	335816	140787	285445	123761	4203960	-3.4
Waste Paper	78395	11189	6790	1313	6782	1236	95004	36.2
Other Fibrous Materials	43640	13149	2615	1030	4881	1288	44672	-4.8
Paper,Paperbd&Products,Total	9123200	3208025	780174	303652	663889	265589	9181583	0.7
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9027147	2984896	771432	281033	656767	245742	9075367	0.6
Paper, Total	8559717	2896106	723157	271647	606131	236467	8471088	-1.2
Newsprint	7222701	2300450	640660	233815	549722	20[illegible]49	7537123	4.8
Printing & Writing	1178507	511722	76168	33919	50228	262[illegible]4	838895	-30.8
Uncoated Groundwood	804596	295996	50859	18058	29873	1316[illegible]	545500	-32.0
Uncoated Book	142674	69291	14243	7667	9593	5312	129236	-21.7
Coated Print.& Impres. Pap	188846	108590	9730	5886	9297	5747	140004	-32.1
Bristols	2247	1243	17	18	35	25	1503	-46.6
Writing and Similar Paper	25220	24547	940	1849	1079	1405	15782	-31.8
Thin (except Cigarette)	14924	12057	379	441	352	615	6870	-50.2
Total Pkg & Other Paper	141196	74212	6024	3706	6076	4284	88971	-41.0
Unbleached Kraft Paper	66816	24551	2820	1223	2485	975	37315	-50.1
Other Pkg. & Indust. Paper	74380	49661	3204	2483	3591	3309	51656	-32.0
Tissue	17312	9722	305	207	105	71	6099	-65.3
Paperboard, Total	82203	19111	9670	2735	6653	1883	111739	47.2
Test or Containerboard	25725	6021	5239	1443	2813	790	53629	187.1
Semi-Chemical Corrugating	33494	5889	2044	418	1942	390	32557	-5.5
Other Paperboard	22984	7201	2387	875	1898	703	25552	12.1
Wet Machine Board	2345	1341	154	98	208	173	2352	-3.4
Construction Paper & Bd. *	382883	68338	38452	6553	43775	7220	490189	30.5
Building Paper	330147	56768	35962	5989	41236	6532	453309	39.8
Insulating Board	21682	4664	1477	341	1472	346	16988	-24.4
Other Building Board	31054	6906	1013	224	1067	341	19891	-31.5
Convtd Paper&Paperbd Products	96053	223129	8742	22618	7122	19846	106216	12.8
Paper Products, Total	90246	211682	8184	21411	6507	18593	99875	13.0
Paperboard Products, Total	5807	11447	558	1207	615	1254	6341	9.8
Notes								
Other: No Weight Avail. ($000)		82849		7366		7999	76751	-4.9
Total Imports Incl. Other($000)		4780381		454148		399872	5339371	14.8

EXPORTS

							(1)	
Pulpwood, Roundwood (in cords of 128 cu. ft.)	263721	11473	16248	892	11909	673	162307	-50.8
Pulpwood Chips	4498674	197847	439761	37889	404893	43769	4642207	8.4
Total All Exports	8971708	3348409	1080056	450721	1070253	441730	11507946	35.4
Wood Pulp,Total	2934815	1103783	361990	157092	356328	163062	3768507	37.1
Cotton Pulp and Other Pulp	131444	74579	17683	11869	10920	7183	176040	35.1
Waste and Old Paper	2233246	256107	253399	35043	220257	28849	2848258	36.9
Paper, Paperbd&Products, Total	3672203	1913940	446983	246718	482748	242637	4715140	33.2
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	3109859	1328320	392294	179435	433306	185417	4075006	35.9
Paper, Total	600874	507569	63095	56187	86695	63114	812896	46.1
Newsprint	71456	32046	6715	3508	27353	13816	156313	178.0
Printing & Writing	274608	233371	28350	24735	30099	23687	302259	11.4
Uncoated Groundwood	80392	55384	10662	6970	11538	7193	90806	12.7
Clay Coated Paper	73521	57743	6353	5380	6020	2649	79806	13.6
Uncoated Free Sheet	68159	64146	6922	7599	7566	7889	75323	11.3
Other Printing & Writing	52536	56098	4413	4787	4976	5956	56324	6.7
Total Pkg. & Other Paper	226906	218218	21619	21787	25286	22056	298591	47.5
Unbleached Kraft	63695	27079	9069	4032	11182	5078	117977	121.4
Other Pkg. & Indust. Paper	163211	191138	12550	17755	14105	16978	180614	21.1
Tissue	27905	23934	6411	6157	3956	3554	55734	108.8
Paperboard, Total	2446972	789902	323856	120362	342961	120234	3197121	34.5
Solid Wood Pulp	2271161	712276	307573	111592	330281	114062	3025122	37.5
Total Linerboard	1644901	434515	240620	78877	276959	86862	2258672	40.9
Bleached Kraft Linerboard	179995	51186	21018	7459	15463	5384	194126	0.9
Unbleached Kraft Linerbd	1464906	383330	219602	71418	261496	81478	2064547	46.4
Other Unbleached Kraft	100301	33739	14498	5866	14568	6201	174023	102.9
Other Bleached Kraft	508601	238813	49990	26067	38724	20970	577331	16.4
Semi-Chemical Corrugating	17358	5208	2464	781	30	30	15095	-2.1
Recycled Paperboard	175811	77626	16284	8770	12680	6172	171999	-3.1
Wet Machine Board	7371	5146	570	412	542	368	7248	-8.4
Construction Paper & Bd. *	54642	25704	4773	2474	3109	1701	57741	0.8
Building Paper	34020	14420	2997	1336	1041	665	26438	-25.2
Insulating Board E	20623	11284	1776	1138	2067	1036	31303	42.7
Convtd Paper&Paperbd Products	562343	585620	54690	67283	49442	57220	640134	18.2
Paper Products, Total	332407	427080	35037	50331	28483	42154	395096	24.7
Paperboard Products, Total	229936	158540	19652	16952	20959	15066	245038	9.2
Notes								
Other: No Weight Avail. ($000)		9803		999		734	11045	44.5
Total Exports Incl. Other($000)		3358212		451721		442465	4588934	47.3

* Hard Pressed Board (not in total)

Imports of Hard Pressed Board	262229	39607	16143	2886	11649	2281	183345	-29.2
Exports of Hard Pressed Board	32030	11223	2136	821	1757	603	26791	-13.4

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1978	YEAR 1979	MARCH 1980	APRIL 1980	MAY 1980	JUNE 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint	3489	3797	377	381	390	370	4553	24.7
Uncoated Groundwood Papers	1569	1674	126	122	125	130	1474	-12.3
Coated Papers	4513	4675	416	394	388	370	4737	3.3
Uncoated Free Sheet (1)	7315	7508	705	674	688	667	8162	9.3
Cotton Fiber Paper (1)	119	127	10	11	10	10	131	-0.8
Thin Papers	350	376	31	30	28	28	354	-7.9
Bleached Bristols	1127	1114	89	86	91	81	1059	-6.3
Tissue Paper	4245	4310	375	367	357	338	4333	0.7
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3873	3923	330	318	320	297	3902	1.4
Other Paper (1)	1905	1791	152	141	134	126	1767	0.4
TOTAL PAPER GRADES	28505	29295	2609	2523	2531	2416	30474	5.3
PAPERBOARD								
Solid Wood Pulp Furnish	22500	22833	2101	1921	2051	2012	24091	6.0
Unbleached Kraft Linerboard	13215	13685	1258	1143	1218	1224	14342	4.8
Other Unbl. Kraft Paperboard	898	1014	116	91	89	92	1126	6.5
Bleached Kraft Paperboard	4002	3934	343	327	374	323	4085	6.8
Semi-Chemical Paperboard	4384	4200	384	360	371	373	4539	9.2
Recycled Paperboard	7534	7240	647	576	548	552	7197	-1.0
TOTAL PAPERBOARD GRADES	30034	30073	2748	2497	2600	2564	31288	4.3
WET MACHINE BOARD	136	144	13	10	8	9	131	-0.3
CONSTR. PAPER & INSUL. BOARD	3332	3322	235	176	160	166	2439	-28.5
TOTAL ALL GRADES [Excl. H.P.B.]*	62006	62834	5605	5207	5298	5155	64333	3.0

PRODUCER PRICE INDEXES

1967 = 100

	1978	1979	MAY	JUNE	JULY	AUG.		
Pulp, Paper and Products	195.6	219.0	248.9	251.3	252.4	252.2	246.5	14.9
Pulp, Paper & Products, except Waste Paper ♦	195.6	219.2	249.3	251.1	253.4	253.2	246.9	15.0
Total Wood Pulp	266.5	314.3	388.0	388.0	388.6	388.6	376.1	23.4
Total Paper	206.1	229.6	256.5	258.3	258.5	258.5	253.5	12.6
Total Paper, exc. Newsprint	199.4	222.8	249.5	249.9	250.1	250.6	246.3	12.6
Newsprint	226.3	249.9	277.6	283.7	283.7	N.A.	274.7	12.6
Total Paperboard	179.6	202.1	239.2	242.7	237.5	238.1	232.8	18.1
Total Paper and Paperboard ♦	197.8	220.9	251.1	253.4	251.9	252.3	247.1	14.2
Converted Products	186.5	209.9	236.1	239.3	242.4	242.0	235.8	14.6
Waste Paper	191.2	206.6	226.1	206.6	194.4	193.8	216.8	6.8
All Commodities	209.3	235.5	263.7	265.2	269.8	273.1	264.0	14.7
Industrial Commodities	209.4	236.4	271.2	273.0	275.6	277.3	270.4	17.6

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979. N.A. - Not Available

* See page 3 for Hard Pressed Board data. ♦ Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from page 2

ton level in April 1980, reached 447,000 tons in June, and made a record high of 483,000 tons in July.

The major tonnage increase in exports has been in the paperboard grades. Kraft linerboard exports in the first seven months of 1980, at 2.3 million tons per year, were 41% over the year-ago total. Exports of bleached kraft paperboard in that same period, at 577,000 tons per year, were up 16%. Exports of paper in the first seven months of 1980, at 813,000 tons per year, were 46% above their year-ago level.

Wood pulp exports made a new high in June at 362,000 tons and held near that, at 356,000 tons, in July. For the first seven months of 1980 wood pulp exports were at a rate of 3.8 million tons per year, some 37% over their year-ago rate.

New Supply

With imports and production both down from first quarter levels in the second quarter of 1980 and exports up sharply, the rate of new supply in the second quarter of the year, at 66.8 million tons per year, was 6% below the first quarter peak of 71.3 million tons per year. Total economic activity, as measured by the real gross national product, fell 2-½%, and the ratio of new supply to real GNP dropped from 49,350 tons per billion dollars in the first quarter of 1980 to 47,440 in the second quarter. The first half 1980 average of 48,400 tons per billion dollars of real GNP was close to the 1976-1979 average of 48,500 tons.

The annual rate of paper and paperboard production in the third quarter, based upon the reported total for July and August and the weekly data on production through mid-September, probably will be only about 61 million tons per year, even with a strong support given by demand for exports. This suggests that the rate of new supply will fall another 5% or 6% from the second quarter level, while the real GNP appears to be flattening.

These figures on new supply and general economic activity suggest that the rate of new supply in the third quarter of 1980 is about 7% below the rate of consumption of paper, paperboard and products. If, as expected, the economic activity continues to hold near its current level for the remainder of the year, the

Continued on page 12

Continued from page 11

possibility of a rebound in paper and paperboard production in the latter months of 1980 is rather strong, inasmuch as inventories of paper, paperboard and products in the channels of distribution have not been particularly high.

Capital Expenditures

In mid-September, the Department of Commerce released revised estimates of capital spending by business for 1980. The new estimate shows that U.S. businesses plan to spend $192.5 billion in new plant and equipment in 1980, 8.7% more than in 1979. In June 1980, the Department of Commerce had expected businesses to spend 9.9% more, and last March, they had indicated an 11.1% increase.

In their new report, Commerce reported that paper companies would spent $6.06 billion on new plant and equipment in 1980, 24% more than the $4.88 billion they spent in 1979. Last June Commerce had estimated that paper companies would spend $60.4 billion. While the difference in the estimates is, of course, quite small, paper is one of the few industries to show an increase from the earlier estimates.

These estimates are consistent with data on capital appropriations for paper industry companies published by The Conference Board. While The Conference Board showed that capital appropriations in the second quarter of 1980 for those paper companies included in the 1,000 largest companies in the United States fell sharply, to $617 million in the second quarter of 1980, compared to $1.6 billion in the first, they also showed that first half total of $2.2 billion was ahead of the 1979 average rate. They also reported that as of the end of the second quarter of 1980 these companies had a closing backlog of unspent capital appropriations of $4.6 billion.

The huge backlog of unspent appropriations also suggests that paper industry capital expenditures will continue at high levels for at least the next two or three quarters.

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

SEPT. 24,1980

	PRODUCTION (000 TONS)					
	Aug. 1980	July 1980	Aug. 1979	Jan - Aug. 1980	- 1979	% Change 80/79
PAPER GRADES	P	R				
Newsprint	412	375	357	3100	2654	16.8
Uncoated Groundwood (s)	124	115	133	1005	998	0.6
Coated Paper (s)	384	340	407	3066	3005	2.0
Uncoated Free Sheet Paper (s)	645	590	695	5364	5196	3.2
Thin Paper (c)	28	26	33	231	255	-9.3
Cotton Fiber Paper (s)	9	8	11	82	83	-1.0
Bleached Bristols (s)	81	78	87	673	684	-1.7
Tissue Paper	345	311	399	2902	3032	-4.3
Unbleached Kraft Packaging & Indl. Converting (s)	300	282	335	2544	2640	-3.6
Other Paper (c)	125	110	158	1119	1175	-4.8
TOTAL PAPER	2453	2234	2613	20085	19721	1.8
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1251	1172	1232	9670	9288	4.1
Other Kraft Paperboard	80	70	94	704	842	-16.4
Semichemical Paperboard	387	362	406	3209	3148	2.0
Bleached Paperboard	328	309	337	2634	2700	-2.4
Recycled Paperboard	566	498	661	4692	5095	-7.9
TOTAL PAPERBOARD	2612	2410	2730	20910	21072	-0.8
CONSTRUCTION & WET MACH GRADES(c)	179	168	317	1632	2349	-30.5
TOTAL PAPER AND PAPERBOARD	5243	4812	5660	42627	43142	-1.2
HARD PRESSED BD.[not in total](c)	145	140	194	1103	1432	-23.0

WOOD PULP (ALL GRADES)	July 1980	June 1980	July 1979	Jan - July 1980	- 1979	% Change 80/79
Dissolving & Special Alpha	111	126	125	913	838	8.9
Bleached Sulphite	101	122	111	830	767	8.3
Unbleached Sulphite	29	34	31	228	231	-1.4
Bleached & Semi-Bl. Sulph.	1473	1568	1457	11175	10444	7.0
Unbleached Sulphate	1591	1728	1631	11828	11654	1.5
Semichemical	306	342	333	2393	2354	1.7
Groundwood and Thermo-Mechanical	366	386	353	2638	2534	4.1
TOTAL PULP DIVISION DATA	3977	4307	4042	30004	28822	4.1
Defib. Exploded & Scrngs E	180	177	250	1296	1761	-26.4
TOTAL WOOD PULP PRODUCTION	4157	4484	4292	31300	30582	2.3

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments R - Revised E - Estimate
P - Preliminary (c) - Census Data - Production, last 2 months estimated.

September 26, 1980

	Full Year		INDUSTRY DATA 1980 R	 R	 P	Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
PAPER AND PAPERBOARD -- Tons (000)	1978	1979	June	July	August		
Total Production (API)........| |...	62109	64555	5205	4812	5243	63941	-1.2
Total Seasonally Adjusted....| excluding |...			5241	5004	5041	63225	-1.5
Imports (including Products).|hard pressed|..E	9117	9123	780	664	685	9061	1.5
Exports (including Products).| board |..E	3373	3672	447	483	460	4816	36.7
Apparent Consumption.........| |...	67854a	70006b	5574	5185	5266	67471c	-3.4
Paper Production % Tonnage Capacity...........	93.1s	95.2s	88.6	78.5	86.3	92.4sh	-
Paperboard Production % Tonnage Capacity......	92.8s	94.2s	92.5	81.6	88.8	91.5s	-
			May	June	July		
MARKET WOOD PULP PRODUCTION - Tons (000)........	5126	5667	572	547	542	6541	20.3
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	47228	49743	4447	4307	3977	51436	4.1
WOOD PULP IMPORTS - TONS (000)..................	4025	4318	373	336	285	4204	-3.4
WOOD PULP EXPORTS - TONS (000)..................	2599	2935	317	362	356	3769	37.1
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			May	June	July		
Wood Pulp..(k)..............................	47911	50156	4351	4174	3780	50247	0.5
Waste Paper....(d)..........................	14760	15400	1185	1109	1034	14299	-1.5
Other (Census)..............................E	778	643	49	43	40	593	-9.7
Total................	63449	66199	5585	5326	4854	65140	-0.1
..WOOD PULP - NON PAPER.........................E	884	909	68	70	65	843	-8.2
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	77290	79566	6811	6969	6356	81393	1.9
EMPLOYMENT (000)			June	July	August		
Paper and Allied Products..........Total......	700.9	706.7	695.0	682.3	689.2	695.6	-1.4
Pulp, Paper and Board Mills........Total.....E	267.4	271.7	270.8	269.9	271.0	270.1	-0.4
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products.....................	6.52	7.12	7.79	7.98	7.98	7.70	10.3
Pulp, Paper Mills...........................E	7.44	8.26	8.99	9.31	9.31	8.94	11.0
Paperboard Mills............................E	7.68	8.38	9.26	9.47	9.47	9.11	11.1
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1980 Q1	1980 Q2	1980 Q3		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)$	3.46	4.88	5.91	6.13	5.84	6.06w	24.2
INDEX OF OUTPUT PER MAN-HOUR (1967=100)..........			June	July	August		
|IN PULP, PAPER |...Production Workers.......	159.2	163.9	164.1	157.5	157.0	164.9	1.3
|AND BOARD MILLS|...All Employees............	153.5	157.8	156.7	149.7	150.1	157.7	0.6
PAPER AND ALLIED PRODUCTS (Million $)			May	June	July		
Industry Shipments (Dept. of Commerce)$........	57654	66033	5649	5756	5968	70275	7.5
Pulp, Paper and Paperboard$................	25343	30165	2661	2798	2743	32986	12.0
Inventories (End of Period) - Total Industry$.	5875	6779	7479	7598	7482	7482	19.8
Pulp, Paper and Paperboard$................	2006	2321	2604	2656	2674	2674	26.7
			1979 Q4	1980 Q1	1980 Q2		
Sales (Corporations Only, FTC)................	48982	55359	14401	14682	14522	58408	8.9
Earnings (Corporations Only, FTC).............	2598	3724	778	795	803	3196	-10.4
Depreciation (Corporations Only, FTC)..........	1726	1896	489	504	510	2028	9.5
Net Worth (Corporations Only, FTC)............	20794	23206	23206	24002	24469	24469	12.2
PRICE INDEXES (Bureau of Labor Stats)1967=100			June	July	August		
Total Pulp, Paper and Allied Products.........	195.6	219.0	251.3	252.4	252.2	246.5	14.9
Wood Pulp.....................................	266.5	314.3	388.0	388.6	388.6	376.1	23.4
Waste Paper...................................	191.2	206.6	206.6	194.4	193.8	216.8	6.8
Paper...	206.1	229.6	258.3	258.5	258.5	253.5	12.6
Paperboard....................................	179.6	202.1	242.7	237.5	238.1	232.8	18.1
PAPER DEMAND (INDEXED: 1967=100)			June	July	August		
Total Paper Production $......................	135.6	141.7	139.9	134.4	137.2	142.8	1.4
Paper New Supply $...........................	132.9	137.2	135.4	125.2	129.7	136.5	-0.4
Total End - Use Index $...................	139.5	144.7	141.5	141.2	141.6	143.8	-0.5
Production of Nondurable Goods $...(19%)..	157.0	164.1	155.3	153.4	154.0	159.9	-2.3
Disposable Income (Constant $) $...(23%)..	145.2	148.5	146.6	148.2	148.4	148.0	-0.4
Total Printing and Publishing $...(58%)..	131.5	136.8	134.9	134.5	134.9	136.8	0.0
Trend Factor	------------------------	-----------------	-----------------	--Not Available--	-----------------	-----------------	-----------------
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production $................	132.8	137.9	138.2	130.9	130.2	135.3	-1.1
Production for Domestic Use	131.1	135.5	129.7	121.0	118.5	129.0	-4.2
Total End - Use Index $....................	147.7	152.0	141.4	139.9	140.4	145.6	-4.4
Production of Consumer Goods $...(60.49%)	149.1	150.6	142.2	141.6	141.7	144.8	-4.3
Production of Equipment $...(6.62%)	132.8	142.2	142.1	141.8	141.6	144.3	2.1
Production of Materials $...(32.89%)	148.3	156.4	139.8	136.5	137.8	147.3	-5.8
Trend Factor	------------------------	-----------------	-----------------	--Not Available--	-----------------	-----------------	-----------------
NEWSPRINT MARKETS			May	June	July		
Consumption by Publishers - Tons (000)........	10872	11240	947	901	839	10858	-0.8
Newspaper Pub. and Printing Empl. Total(000)..	407.4	423.0	431.1	433.7	431.6	431.6	2.8
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	115090	116636	11034	9308	7278	110542	2.5
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	17586	19721	1762	1732	1724	21276	11.0
Inventories (End of Period)	1482	1695	1777	1803	1768	1768	10.0
Paper Only..............................Sales	13078	14788	1317	1306	1260	15744	9.3
Inventories (End of Period)	1025	1141	1196	1242	1216	1216	12.7
RETAIL TRADE (Million $)			June	July	August		
Total Retail Sales $.........................	799054	884407	76001	78394	79533	926276	6.7
Nondurable Goods Stores Sales $..............	518190	576882	52789	53254	53787	630192	11.9
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)$.	146.1	152.5	141.4	139.8	140.5	146.4	-4.0
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	209.3	235.5	265.2	269.8	273.1	264.0	14.7
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	195.4	217.4	247.6	247.8	249.4	242.7	14.0
			May	June	July		
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	275.6	311.3	303.8	301.4	301.8	301.8	2.3
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1979 Q4	1980 Q1	1980 Q2		
G.N.P. or Expenditure - Current $.............	2127.6	2368.8	2456.9	2520.8	2521.3	2521.0	9.1
G.N.P. OR Expenditure - 1972 $................	1399.2	1431.6	1440.3	1444.7	1408.6	1426.6	0.0

lb/capita Popul.(mil)
.a - 621 218.7
.b - 635 220.6
.c - 607 222.2
.d - 1977 - 12103; 1978 - 12481
. 1979 12956;Ja-Jn'80A.R.12702
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1978 - 3,140; 1979 - 3,018; 1980 A.R.Y-T-D 2,222 (000 tons)
s - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '78 - 1,666; '79 - 1,593 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
w - Full year estimated by U.S. Dept. of Commerce
$ - Seasonally adjusted

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MONTHLY STATISTICAL SUMMARY

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PRODUCTION STRENGTHENS

Paper and paperboard production strengthened significantly in September. The August-September* seasonally adjusted rate of production rose to 62.3 million tons per year, 2.4% above the July-August rate of 60.8 million tons per year. Total paper and paperboard production had been in a downtrend throughout the January-August period. The January-February seasonally adjusted level was 66.6 million tons per year and the production trend declined in each succeeding month to the July-August low.

The following table shows the trend of total paper and paperboard production and of the paper, paperboard and the construction and other grades separately.

PAPER AND PAPERBOARD PRODUCTION

Seasonally Adjusted Annual Rate - Two Month Moving Average

(000 Tons)

	Jan.-Feb.	Feb.-Mar.	Mar.-Apr.	Apr.-May	May-June	June-July	July-Aug.	Aug.-Sept.
Paper	31.4	30.3	30.1	29.9	29.1	28.7	28.6	29.2
Paperboard	32.0	31.1	30.2	29.7	30.2	30.2	29.9	30.9
Construction & Other Grades	3.2	3.1	2.5	2.0	1.9	2.1	2.2	2.2
TOTAL	66.6	64.5	62.8	61.7	61.1	61.0	60.8	62.3

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* Technical Note: A two month average of the monthly seasonally adjusted data is required to estimate the underlying trend of production.

Continued on Page 2

Continued from Page 1

The strength in production in September was evident throughout the grade structure. The rate of total paper production, for example, rose 2% from the July-August low to 29.2 million tons per year, with gains recorded in all the major grade groups. Total printing/writing papers rose by 2.9%; tissue papers by an estimated 1.6% and packaging and other papers an estimated 3.4%. Newsprint production has been running close to capacity levels throughout the year, and remained high in September at a trend level of 4.76 million tons per year.

Compared to year-ago levels, total paper production in the first nine months of 1980 was up by 1.8%. The increase, however, was centered entirely on newsprint and the printing and writing grades. Newsprint production rose 16%; total printing and writing paper shipments rose 1.6%. While tissue paper, packaging and other paper production showed strength in September, the nine-month total for tissue paper was 4% below its year-ago level; packaging and other paper production was down by 3%. The decline from the January-February peak of 31.4 million tons per year to the July-August low was 9% for paper production in total.

The trend in paperboard production was somewhat stronger. The September turnaround brought the seasonally adjusted trend of paperboard production up 3% from the month-earlier level. The total decline from the January-February rate of 32.0 million tons per year to the July-August low was 6%. This reflected a relatively flat trend in the production of solid wood pulp paperboard during the year, offset by a sharply declining trend in the production of recycled paperboard. The January-September total for solid wood pulp production was 1.3% ahead of its year-ago level; recycled paperboard production was down by 9%. This brought total paperboard production 1.6% below its year-ago level.

Market Trends

The upturn in September was consistent with the trends in activity in paper and paperboard markets. According to preliminary reports of the Department of Commerce, total economic activity as measured by real GNP showed a small gain from the second to third quarters of 1980. Similarly, total industrial production rose in August and September, after having declined steadily from January to July.

The seasonally adjusted value of shipments of paper products by paper merchants showed a strong upturn in August, while inventories declined slightly. The August 1980 current dollar value of inventories held by paper merchants was only 7% above its year-ago level, indicating a decline in the physical volume of these inventories.

Continued on Page 11

PAPER AND PAPERBOARD STATISTICS

PRODUCTION, SHIPMENTS AND ORDERS

(Thousands of Tons)

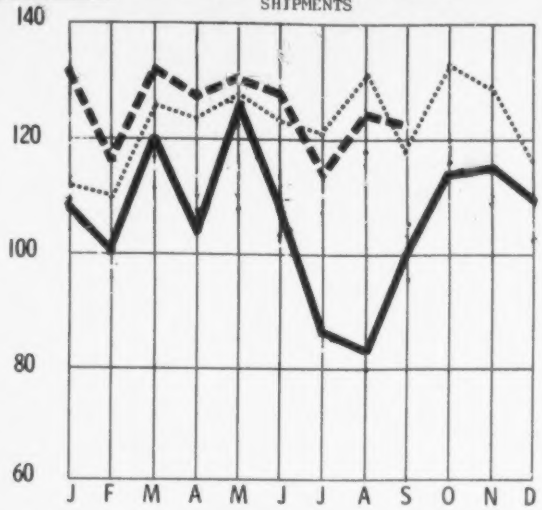
	YEAR 1978	YEAR 1979	JUNE 1980	JULY 1980	AUG. 1980	SEPT 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint - Production	3768	4062	393	375	412	370	4627	16.0
- Shipments	3779	4066	382	385	409	375	4614	15.7
Printing & Writing	14596	15368	1256	1157	1244	1252	15528	1.6
Groundwood Paper - Shipments	1354	1509	127	116	125	123	1505	0.7
- New Orders	1414	1519	115	118	135	122	1500	-2.6
- Unfilled Orders	185	149	119	119	131	122	122	-30.0
Coated Paper - Shipments	4453	4527	364	340	374	394	4600	2.4
- New Orders	4432	4547	357	400	381	390	4724	4.3
- Unfilled Orders	404	385	344	405	403	387	387	0.8
Unctd Free Sheet - Shipments	7221	7813	650	591	636	622	7972	2.7
- New Orders	7538	7826	579	582	584	583	7570	-3.9
- Unfilled Orders	754	780	571	578	533	487	487	-41.1
Thin Paper - Production *	350	376	28	24	27	28	342	-10.3
Cotton Fiber Paper - Shipments	114	125	9	8	9	10	123	-0.9
Bleached Bristols - Production	1103	1018	78	78	72	75	985	-4.0
Tissue Paper - Production	4215	4506	340	323	346	340	4342	-4.2
Total Packaging & Other Paper	5789	5725	426	397	441	455	5520	-3.1
Unbl. Kraft Paper - Shipments	3884	3934	299	282	306	320	3827	-2.9
Other Paper - Production * #	1905	1791	127	115	135	135	1693	-3.5
TOTAL PAPER-Production-Unadj.	28367	29661	2416	2253	2443	2417	30016	1.8
-Production-S.A.			2368	2417	2356	2512	29839	1.4
PAPERBOARD - PRODUCTION							##	
Solid Wood Pulp Furnish	22790	23838	2050	1909	2042	1953	24187	1.3
Unbl. Kraft Linerboard - Total	13228	13951	1254	1172	1251	1176	14465	4.0
Production for Export	1466	1645	218	239	248	182	2246	38.8
Other Unbl. Kraft Paperboard	1144	1200	80	66	76	81	1003	-19.1
Semichemical Paperboard	4439	4689	401	362	387	383	4789	1.6
Production for Export	119	98	28	30	35	32	234	129.4
Solid Bleached Paperboard	3979	3998	314	309	328	313	3929	-2.3
Production for Export	430	491	50	36	54	54	561	13.6
Recycled Paperboard	7485	7591	558	478	544	571	6929	-9.1
Production for Export	22	22	5	12	11	8	75	282.1
TOTAL PAPERBOARD-Prod.-Unadj.	30275	31429	2608	2387	2586	2524	31116	-1.3
- Containerboard Prod.(Dom. Use)	17908	18825	1566	1400	1496	1487	18636	-0.8
- Boxboard Production (Dom. Use)	6505	5776	429	404	432	433	5435	-7.1
- All Other P'bd Prod.(Dom. Use)	3825	4571	313	266	308	328	3929	-15.3
- Total Paperbd Prod. for Export	2037	2257	300	318	348	277	3117	39.6
TOTAL PAPERBOARD PROD. - S.A.			2537	2497	2493	2646	30715	-1.6
WET MACHINE BOARD *	136	144	9	8	11	12	129	-1.7
BUILDING PAPERS *	1915	1900	96	92	105	100	1391	-27.5
INSULATING BOARD *	1416	1422	68	71	85	75	937	-35.4
TOTAL ALL GRADES - Unadjusted	62109	64555	5196	4811	5229	5128	63589	-1.4
- Production - S.A.			5070	5100	5032	5347	63003	-1.8
HARD PRESSED BD. [not in total]*	2294	2123	131	149	160	135	1681	-22.1

* Census Data - Production. Last two months estimated.	S.A. Seasonally Adjusted
# Production excludes API bleached kraft envelope.	P Preliminary
## Includes revisions not available monthly.	R Revised

### Data for unbleacned kraft folding boxboard for 1979 and 1980 included in All Other.

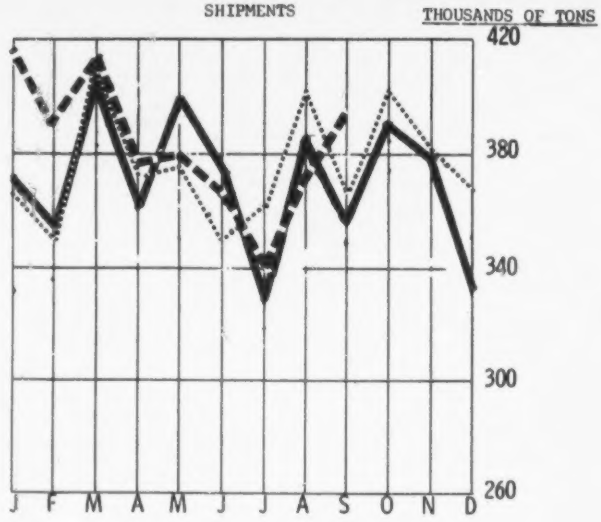
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



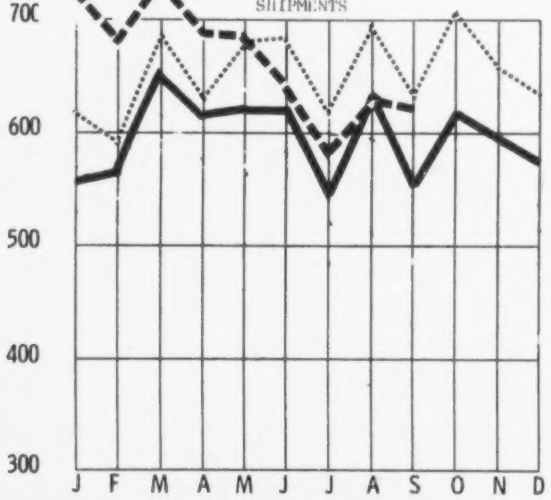
COATED PAPER

SHIPMENTS



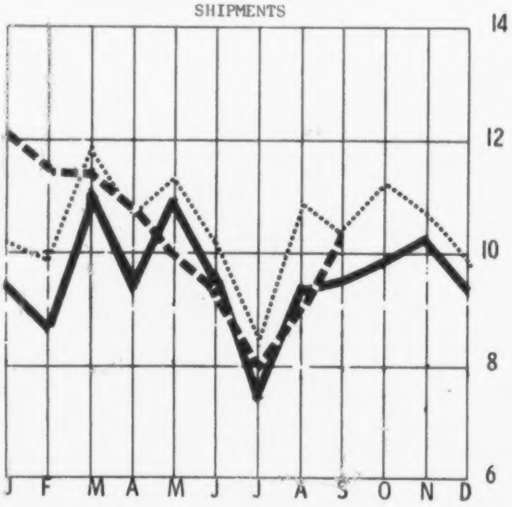
UNCOATED FREE SHEET PAPERS

SHIPMENTS



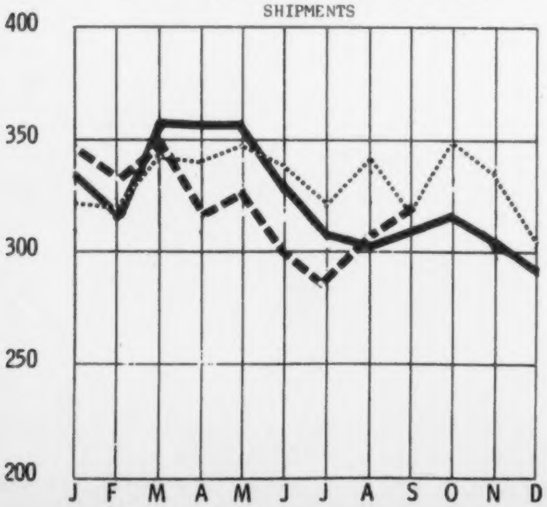
COTTON FIBER PAPER

SHIPMENTS



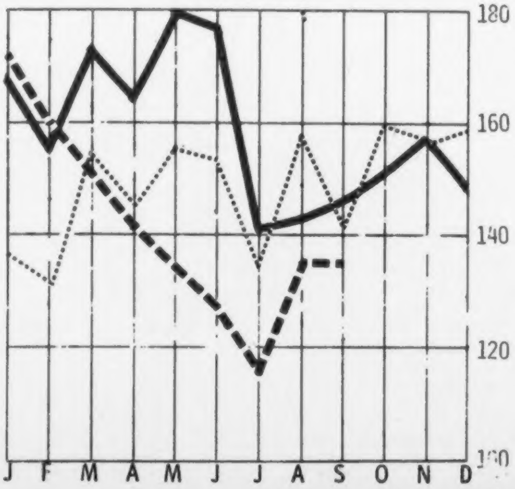
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



OTHER PAPER

PRODUCTION



1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

WOOD PULP STATISTICS
(Thousands of Tons)

		YEAR 1978	YEAR 1979	MAY 1980	JUNE 1980	JULY 1980	AUG. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
TOTAL WOOD PULP (1)						R	P		
Total Wood Pulp	- Production	47228	49743	4447	4307	3965	4334	51490	3.6
	- Imports	4025	4318	373	336	285	334	4180	-4.5
	- Exports	2599	2935	317	362	356	385	3875	39.6
	- New Supply	48653	51126	4502	4281	3894	4284	51795	1.0
Dissolving Pulp	- Production	1411	1497	138	126	111	129	1562	4.8
	- Imports	189	193	19	34	12	24	282	58.9
	- Exports	758	764	58	79	73	70	829	11.6
	- New Supply	842	926	99	81	51	82	1014	9.7
Paper Grades Chemical Pulp	- Production	37893	39785	3564	3453	3179	3474	41279	3.8
	- Imports	3627	3923	328	288	267	257	3667	-7.9
	- Exports	1780	2100	254	270	279	308	2953	49.6
	- New Supply	39740	41608	3637	3472	3167	3423	41993	0.5
Groundwood and Thermo-Mech.	- Production	4141	4394	395	386	369	397	4557	4.3
	- Imports	208	201	26	14	6	21	182	-15.6
	- Exports	62	70	5	13	4	7	92	57.3
	- New Supply	4287	4525	415	386	371	411	4647	2.6
Semi-Chemical	- Production	3783	4068	351	342	306	335	4091	0.8
	- Imports	0	0						
	- Exports	0	0	------ Included with Groundwood Pulp ------					
	- New Supply	3783	4068	351	342	306	335	4091	0.8
MARKET WOOD PULP									
Total Market Wood Pulp	- Production	5126	5667	572	547	542	564	6570	19.0
	- Imports	2816	3046	239	245	202	243	2992	-3.7
	- Exports	2480	2784	287	321	296	311	3457	31.3
	- New Supply	5462	5930	524	470	448	496	6105	1.8
Dissolving Pulp	- Production	1406	1497	138	126	108	132	1560	4.6
	- Imports	291	306	15	31	11	24	240	-28.6
	- Exports	824	869	72	90	65	61	892	6.9
	- New Supply	873	934	81	67	54	95	907	-8.6
Paper Grades Chemical Pulp	- Production	3644	4107	428	414	429	425	4927	24.0
	- Imports	2495	2734	223	214	191	216	2736	-1.0
	- Exports	1613	1870	213	225	229	245	2505	43.0
	- New Supply	4525	4971	438	403	391	396	5158	3.4
Groundwood Pulp and All Other	- Production	76	64	7	7	6	7	83	45.9
	- Imports	26	7	1	0	0	3	16	135.6
	- Exports	42	46	2	7	2	5	60	28.3
	- New Supply	59	25	5	0	4	5	39	128.7

(1) Prodctn excludes defibrated, exploded & screenings-(000 tons): 1978 - 3,140; 1979 - 3,061; A.R.Y-T-D'80 - 2,264

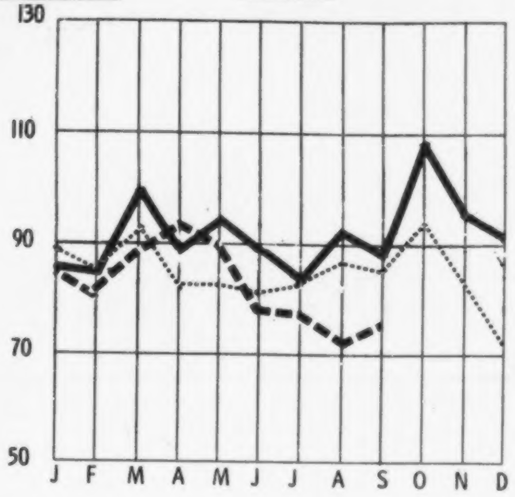
SOURCES: Total Wood Pulp Imports & Exports - Department of Commerce. Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp & Raw Materials Group, API.

FIBROUS RAW MATERIALS
(Thousands of tons)

	1978	1979	MAY 1980	JUNE 1980	JULY 1980	AUG. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
CONSUMPTION AT PAPER & BD. MILLS					R	P		
Total	63449	66199	5585	5324	4909	5073	64687	-1.1
Total Wood Pulp (2) A	47911	50156	4351	4172	3833	3870	49849	-0.8
Market Wood Pulp A	4774	5031	361	374	367	410	4828	-4.9
Waste Paper (3) A	14760	15400	1185	1109	1034	1157	14247	-1.8
Rags, Straw & Other C, E	778	643	49	43	42	46	591	-10.3
INVENTORIES								
Wood Pulp at Pulp Mills A	130	107	126	141	117	136	136	12.0
Market Pulp at Pulp Mills A	187	132	179	187	234	235	235	41.3
Mkt Pulp at Ppr.& Bd. Mills CE	435	426	485	462	456	460	460	5.0
Waste Ppr.at Ppr.&Bd. Mills (4)	740	798	786	822	934	945	945	17.3
Rags, Straw and Other at Paper and Board Mills C, E	66	61	58	59	60	60	60	-1.6
Mkt Wood Pulp Days of Supply A	44	38	53	48	54	48	48	15.3
Wood Pulp Consumption at at Non-Paper Mills C, E	884	909	68	70	61	65	829	-9.6

A - Pulp & Raw Materials Group, API; C - Bureau of the Census; E - Most Recent Month Estimated by API
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons
(2) Excludes consumption of defibrated & exploded pulp for hard pressed bd.(000 tons): 1978 - 1,666; 1979 - 1,593
(3) Census Waste Paper Consumption, (000 tons): 1978 - 12,481; 1979 - 12,962; Jan-Jul '80 A.R. - 12,536
(4) Census data prior to 1979; more recent data are from the Paper Stock Conservation Committee, A.P.I.

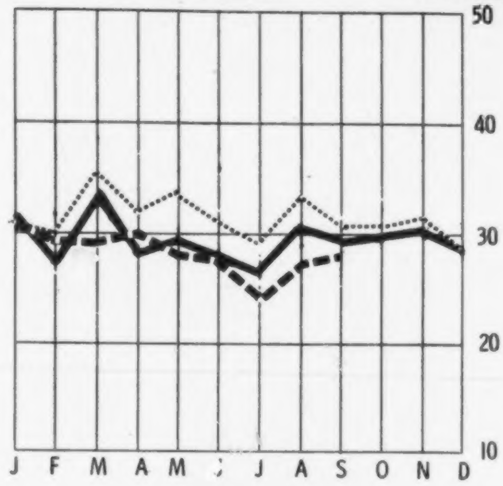
THOUSANDS OF TONS



BLEACHED BRISTOLS

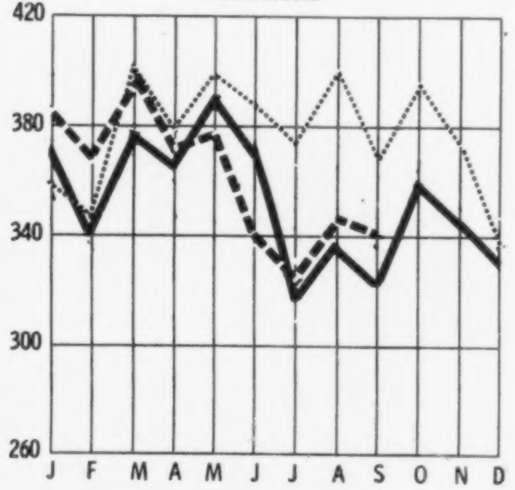
PRODUCTION

THOUSANDS OF TONS



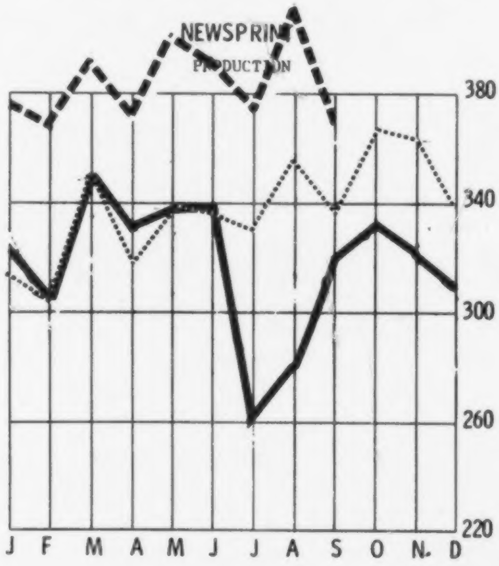
THIN PAPERS

PRODUCTION



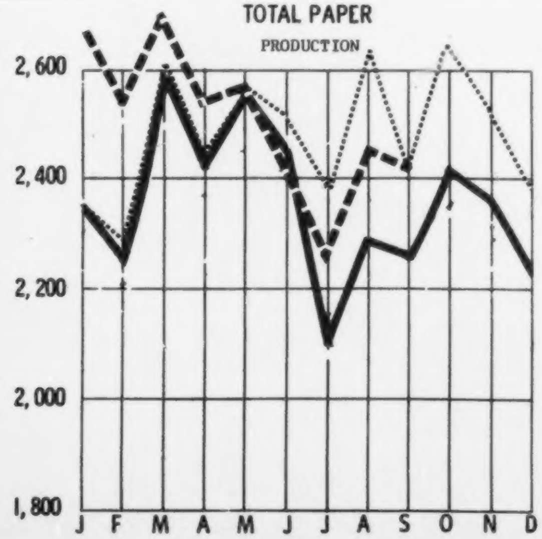
TISSUE PAPER

PRODUCTION



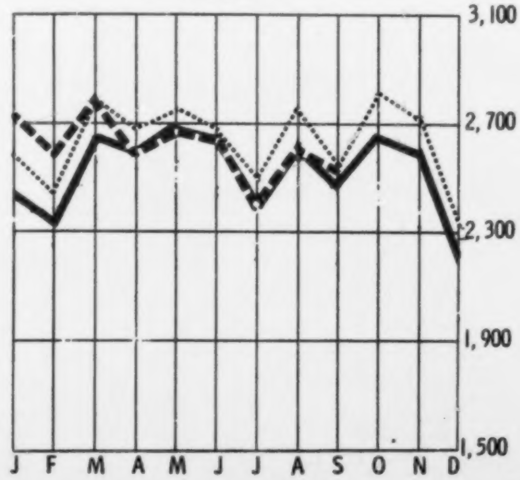
NEWSPRINT

PRODUCTION



TOTAL PAPER

PRODUCTION



TOTAL PAPERBOARD

PRODUCTION

1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

FIBROUS RAW MATERIALS (Continued)

(Thousands of Standard (128 cubic foot) Cords)

		YEAR 1978	YEAR 1979	MAY 1980	JUNE 1980	JULY 1980	AUG. 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PULPWOOD									
Total U.S.	- Total Receipts	77025	78625	6790	7365	6782	6906	82976	7.2
	- Total Consumpt.	77290	79566	6811	6969	6356	6719	81297	1.8
	- Residues *	30369	30015	2404	2651	2433	2409	29175	-3.7
	- Inventories	6244	5506	5425	5715	6114	6310	6310	30.2
So. Atlantic	- Total Receipts	25353	26126	2349	2426	2293	2289	27425	5.4
	- Total Consumpt	25204	26523	2267	2340	2196	2267	27399	2.8
	- Residues *	8513	8858	730	766	745	787	8901	-0.5
	- Inventories	1191	1052	958	1049	1182	1211	1211	24.6
Northeast	- Total Receipts	6664	7461	509	625	572	651	7655	3.7
	- Total Consumpt	6607	7584	622	611	493	599	7472	-2.2
	- Residues *	1662	1670	143	130	113	137	1637	-4.1
	- Inventories	770	674	587	598	665	714	714	14.2
South Central	- Total Receipts	25572	26654	2194	2439	2298	2320	27221	3.5
	- Total Consumpt	25678	26432	2335	2333	2201	2262	27113	1.1
	- Residues *	8418	8669	569	670	655	697	7785	-12.6
	- Inventories	1194	1472	1268	1347	1456	1475	1475	68.8
North Central	- Total Receipts	5291	5630	407	400	409	367	5654	4.4
	- Total Consumpt	5330	5535	461	441	378	427	5264	-6.3
	- Residues *	1456	1501	114	107	113	106	1391	-5.2
	- Inventories	968	993	1255	1214	1221	1181	1181	50.3
West	- Total Receipts	14145	12754	1331	1475	1210	1279	15023	21.9
	- Total Consumpt	14471	13492	1126	1244	1088	1164	14051	7.0
	- Residues *	10320	9317	848	978	807	682	9462	2.2
	- Inventories	2121	1315	1357	1507	1590	1729	1729	8.7

* - Consumption of Residues in Cord Equivalents.
SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA

IMPORTS FROM CANADA

	YEAR 1979 Tons	YEAR 1979 $000	JULY 1980 Tons	JULY 1980 $000	AUG. 1980 Tons	AUG. 1980 $000	Annual Rate Y-T-D 1980	% Change from same Period Last Year
Pulpwood, Roundwood (in cords of 128 cubic feet)	206050	8867	17239	556	15585	632	184724	-10.0
Pulpwood Chips	1527734	30440	146749	3885	108335	3083	1728080	15.0
Wood Pulp, Total	4143944	1404354	276644	120412	291404	107747	3922071	-6.7
Waste Fibrous Materials, Total	104358	16281	11112	2019	10106	1857	129197	27.6
Paper,Paperboard&Products,Total	8501966	2779223	631839	235738	629080	229266	8539912	0.2
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. *	8457803	2725085	628459	231205	625665	224770	8482815	0.1
Paper, Total	8015574	2642945	580907	222672	579681	216466	7910350	-1.6
Newsprint	7077209	2249470	539628	201638	538208	195847	7269101	2.5
Printing,Writing & Rel.Pap.	799968	323175	35712	17605	35725	17231	556277	-30.9
Pack. & Ind. Conv. Paper	118815	57854	5393	3262	5463	3128	78279	-35.6
Special Industrial Paper	2544	2967	70	96	81	123	1262	-43.5
Tissue Paper	17039	9479	105	71	203	137	5431	-69.6
Paperboard, Total	80636	17653	6606	1831	4687	1062	104127	39.5
Wet Machine Board	1522	703	110	65	118	70	1556	-0.5
Construction Paper and Bd. *	360071	63784	40837	6637	41179	7173	466782	28.8
Convtd Paper&Paperbd Products	44163	54138	3380	4533	3415	4496	57097	33.0

EXPORTS TO CANADA

Pulpwood, Roundwood (in cords of 128 cubic feet)	263367	11446	9868	583	13583	807	147729	-51.9
Pulpwood Chips	87790	3790	1036	53	1253	57	22437	-78.5
Wood Pulp, Total	136641	49608	11673	5158	7724	3560	169236	25.9
Cotton Pulp & Other Pulp	7921	3728	811	472	463	339	12363	43.0
Waste Paper	478477	50207	27943	3191	33366	3718	495599	12.0
Paper,Paperboard&Products,Total	624928	353202	38325	26625	39478	29526	571072	-9.1
Paper, Paperboard, Wet Machine Bd & Constr. Paper & Board *	454029	248403	28094	18035	29003	19988	410645	-10.1
Paper, Total	181451	142407	16710	12754	17659	14725	212762	21.4
Newsprint	2803	1734	167	167	186	187	1912	-44.8
Printing,Writing & Rel.Pap.	108290	76567	9595	6233	9736	7490	113044	6.3
Pack. & Ind. Conv. Paper	16084	10108	700	603	1015	861	14038	-14.1
Special Industrial Paper	46773	48173	5638	5284	6345	5832	77391	92.4
Tissue	7502	5825	610	468	377	355	6377	-27.9
Paperboard, Total	230904	83021	9750	4416	9632	4459	166618	-29.0
Wet Machine Board	5262	7916	231	169	182	135	3620	-35.6
Construction Pap. & Bd. E *	36411	13059	1403	697	1530	669	27645	-33.2
Convtd Paper&Paperbd Products	170900	104799	10231	8590	10475	9538	160427	-6.3

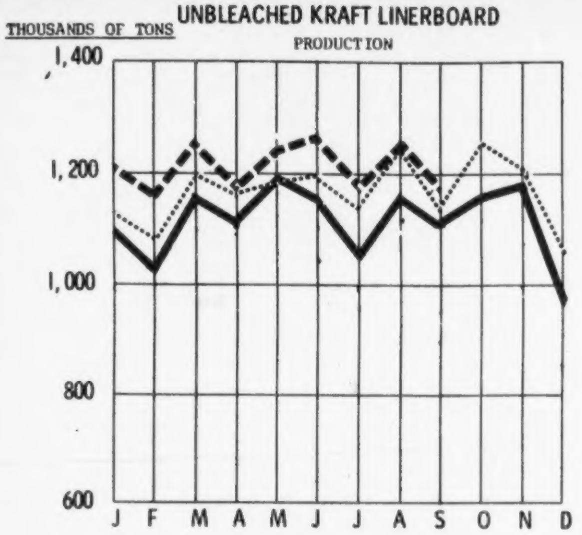
* - Hard Pressed Board (not in total)

Imports of Hard Pressed Bd.	29771	5370	3320	665	2279	486	38016	75.5
Exports of Hard Pressed Bd.	20535	6878	1365	428	1559	628	19386	-12.9

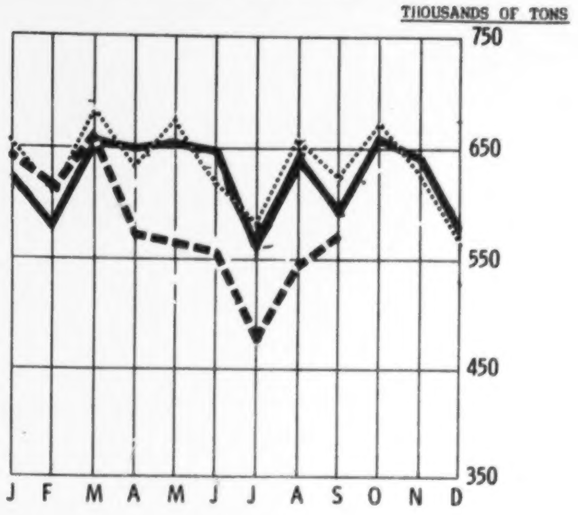
SOURCE: Bureau of Census, Department of Commerce. E - Estimate of tonnage based on square foot data

UNBLEACHED KRAFT LINERBOARD

PRODUCTION

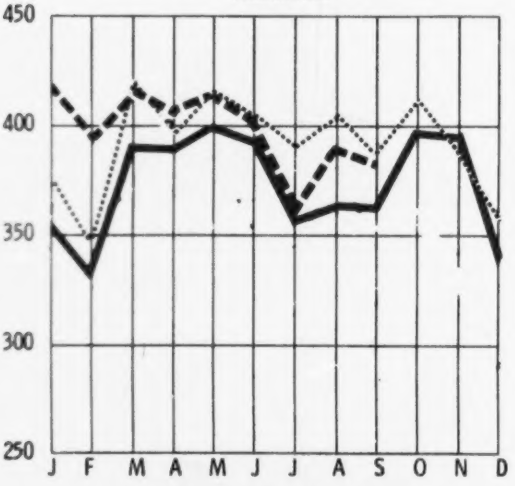


RECYCLED PAPERBOARD



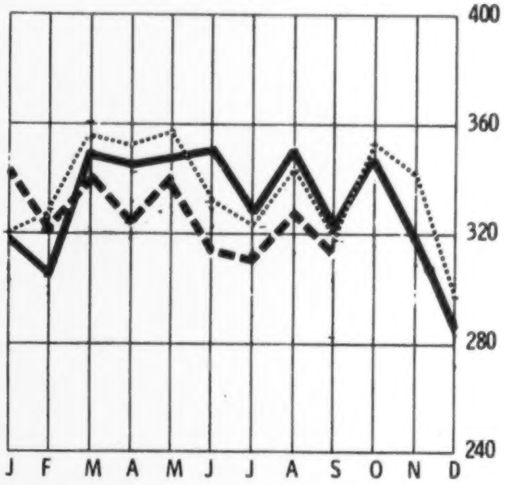
SEMI-CHEMICAL PAPERBOARD

PRODUCTION



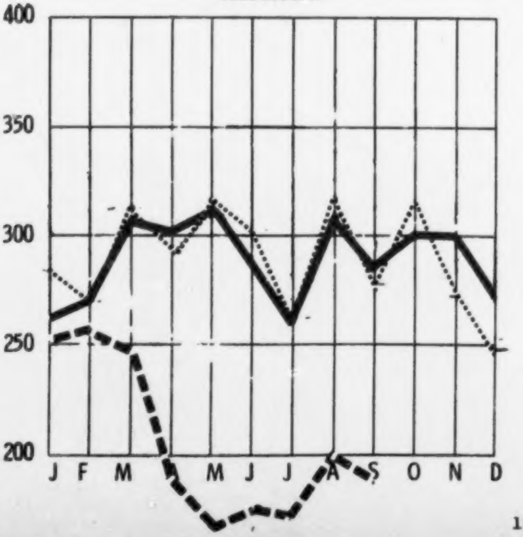
SOLID BLEACHED PAPERBOARD

PRODUCTION



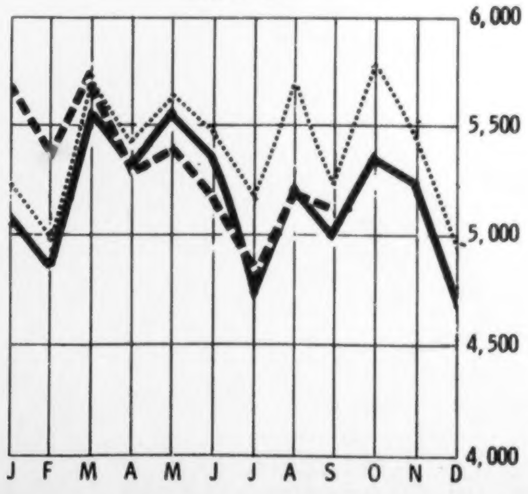
WET MACHINE BOARD AND
BUILDING PAPER AND BOARD

PRODUCTION



TOTAL PAPER AND BOARD

PRODUCTION



1978 ▬▬ 1979 ········ 1980 ▬ ▬ ▬

PULP, PAPER AND PAPERBOARD IMPORTS AND EXPORTS DATA

IMPORTS

	YEAR 1979		JULY 1980		AUG. 1980		(1) Annual Rate Y-T-D 1980	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000		
Pulpwood, Roundwood (in cords of 128 cubic feet)	206074	8869	17239	556	15585	632	184698	-10.1
Pulpwood Chips	1574763	33413	1467490	3885	108335	3083	3709442	135.7
Total All Imports	13562756	4697532	960997	391873	1003010	402654	13339081	-2.6
Wood Pulp, Total	4317522	1465169	285445	123761	334135	141248	4179668	-4.5
Waste Paper	78395	11189	6782	1236	6032	1003	92177	29.6
Other Fibrous Materials	43640	13149	4881	1288	5147	1536	46808	-5.0
Paper,Paperbd&Products,Total	9123200	3208025	663889	265589	657696	258867	9020429	-1.9
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	9027147	2984896	656767	245742	649935	237832	8915849	-2.0
Paper, Total	8559717	2896106	606131	236467	601033	229013	8313752	-3.8
Newsprint	7222701	2300450	549722	205849	546347	199733	7414503	2.4
Printing & Writing	1178507	511722	50228	26264	48333	25036	806532	-34.4
Uncoated Groundwood	804596	295996	29873	13160	32282	14337	525735	-36.3
Uncoated Book	142674	69291	9593	5312	6446	3685	122750	-22.7
Coated Print.& Impreg. Pap	188846	108590	9297	5747	8674	5318	135514	-33.9
Bristols	2247	1243	35	25	32	24	1362	-49.9
Writing and Similar Paper	25220	24547	1079	1405	483	1185	14534	-38.7
Thin (except Cigarette)	14924	12057	352	615	417	487	6636	-53.2
Total Pkg & Other Paper	141196	74212	6076	4284	6141	4097	87061	-41.4
Unbleached Kraft Paper	66816	24551	2485	975	2921	1228	37033	-49.4
Other Pkg. & Indust. Paper	74380	49661	3591	3309	3219	2868	50028	-33.6
Tissue	17312	9722	105	71	213	147	5657	-69.1
Paperboard, Total	82203	19111	6653	1883	4740	1136	104882	37.1
Test or Containerboard	25725	6021	2813	790	1682	433	49448	168.5
Semi-Chemical Corrugating	33494	5889	1942	390	2040	400	31547	-10.2
Other Paperboard	22984	7201	1898	703	1019	302	23886	3.9
Wet Machine Board	2345	1341	208	173	189	71	2341	-4.5
Construction Paper & Bd. *	382883	68338	43775	7220	43973	7613	494874	28.8
Building Paper	330147	56768	41236	6532	40953	6939	458076	37.6
Insulating Board	21682	4664	1472	346	1822	376	17597	-20.8
Other Building Board	31054	6906	1067	341	1198	298	19201	-34.0
Convtd Paper&Paperbd Products	96053	223129	7122	19846	7761	21035	104580	10.2
Paper Products, Total	90246	211682	6507	18593	7359	19967	98429	10.4
Paperboard Products, Total	5807	11447	615	1254	402	1069	6151	6.4
Notes								
Other: No Weight Avail. ($000)		82849		7999		7473	78366	-4.7
Total Imports Incl. Other($000)		4780381		399872		410127	5287140	12.4

EXPORTS

							(1)	
Pulpwood, Roundwood (in cords of 128 cu. ft.)	263721	11473	11909	673	13825	833	162756	-47.1
Pulpwood Chips	4498674	197847	404893	43769	394970	41198	4654386	7.9
Total All Exports	8971708	3348409	1070253	441730	1138682	479229	11777477	38.1
Wood Pulp,Total	2934815	1103783	356328	163062	384881	174725	3874766	39.6
Cotton Pulp and Other Pulp	131444	74579	10920	7183	8531	5740	166832	31.7
Waste and Old Paper	2233246	256107	220257	28849	197912	23397	2789094	32.4
Paper, Paperbd&Products, Total	3672203	1913940	482748	242637	547358	275367	4946786	40.4
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	3109859	1328320	433306	185417	498665	213063	4313628	45.0
Paper, Total	600874	507569	86695	63114	90917	69744	847660	51.3
Newsprint	71456	32046	27353	13816	14656	7819	158757	193.0
Printing & Writing	274608	233371	30099	23687	31528	26811	311769	13.7
Uncoated Groundwood	80392	55384	11538	7193	9359	6356	93493	14.0
Clay Coated Paper	73521	57743	6020	2649	10214	7233	85151	18.0
Uncoated Free Sheet	68159	64146	7566	7889	8113	8205	78077	16.8
Other Printing & Writing	52536	56098	4976	5956	3843	5018	55047	3.7
Total Pkg. & Other Paper	226906	218218	25286	22056	36894	28649	316609	54.3
Unbleached Kraft	63695	27079	11182	5078	18368	8004	130782	163.3
Other Pkg. & Indust. Paper	163211	191138	14105	16978	18526	20645	185827	19.4
Tissue	27905	23934	3956	3554	7839	6465	60526	125.7
Paperboard, Total	2446972	789902	342961	120234	402201	140327	3400782	44.8
Solid Wood Pulp	2271161	712276	330281	114062	376597	129457	3211877	47.6
Total Linerboard	1644901	434515	276959	86862	310428	97554	2441980	55.8
Bleached Kraft Linerboard	179995	51186	15463	5384	19345	6733	198878	7.2
Unbleached Kraft Linerbd	1464906	383330	261496	81478	291083	90821	2243102	62.3
Other Unbleached Kraft	100301	33739	14568	6201	16545	5822	177087	92.4
Other Bleached Kraft	508601	238813	38724	20970	47775	25530	578827	15.1
Semi-Chemical Corrugating	17358	5208	30	30	1850	551	15983	5.9
Recycled Paperboard	175811	77626	12680	6172	25604	10870	188905	8.9
Wet Machine Board	7371	5146	542	368	591	552	7229	-8.8
Construction Paper & Bd. *	54642	25704	3109	1701	4956	2441	57957	1.6
Building Paper	34020	14420	1041	665	3181	1458	27905	-21.7
Insulating Board E	20623	11284	2067	1036	1775	983	30053	40.6
Convtd Paper&Paperbd Products	562343	585620	49442	57220	48693	62303	633157	15.6
Paper Products, Total	332407	427080	28483	42154	29208	43975	389521	20.7
Paperboard Products, Total	229936	158540	20959	15066	19485	18328	243636	8.3
Notes								
Other: No Weight Avail. ($000)		9803		734		600	10564	29.2
Total Exports Incl. Other($000)		3358212		442465		479828	4735059	50.5
* Hard Pressed Board (not in total)								
Imports of Hard Pressed Board	262229	39607	11649	2281	14044	2313	181493	-28.8
Exports of Hard Pressed Board	32030	11223	1757	603	1948	824	26364	-20.3

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PAPER AND PAPERBOARD PRODUCTION

CENSUS DATA

(Thousands of Tons)

	YEAR 1978	YEAR 1979	APRIL 1980	MAY 1980	JUNE 1980	JULY 1980	Annual Rate Y-T-D 1980	% Change from same Period Last Year
PAPER					R	P		
Newsprint	3489	3797	381	390	372	359	4520	24.6
Uncoated Groundwood Papers	1569	1674	122	125	129	114	1456	-12.5
Coated Papers	4513	4675	394	388	368	350	4657	1.4
Uncoated Free Sheet (1)	7315	7508	674	688	651	584	7970	7.6
Cotton Fiber Paper (1)	119	127	11	10	10	8	127	-1.5
Thin Papers	350	376	30	28	28	24	345	-9.2
Bleached Bristols	1127	1114	86	91	77	72	1024	-7.9
Tissue Paper	4245	4310	367	357	335	326	4268	-0.7
Unbleached Kraft Packaging & Industrial Conv. Papers(1)	3873	3923	318	320	297	273	3813	-0.5
Other Paper (1)	1905	1791	141	134	127	115	1714	-1.7
TOTAL PAPER GRADES	28505	29295	2523	2531	2394	2224	29894	3.9
PAPERBOARD								
Solid Wood Pulp Furnish	22500	22833	1921	2051	2038	1910	23969	5.7
Unbleached Kraft Linerboard	13215	13685	1143	1218	1250	1152	14314	4.7
Other Unbl. Kraft Paperboard	898	1014	91	89	92	75	1093	3.2
Bleached Kraft Paperboard	4002	3934	327	374	323	339	4082	7.1
Semi-Chemical Paperboard	4384	4200	360	371	373	344	4480	8.3
Recycled Paperboard	7534	7240	576	548	553	470	6977	-1.8
TOTAL PAPERBOARD GRADES	30034	30073	2497	2600	2591	2381	30947	3.9
WET MACHINE BOARD	136	144	10	8	9	8	127	0.3
CONSTR. PAPER & INSUL. BOARD	3332	3322	176	160	164	163	2368	-29.5
TOTAL ALL GRADES [Excl. H.P.B.]*	62006	62834	5207	5298	5158	4276	63335	2.0

PRODUCER PRICE INDEXES

1967 = 100

	1978	1979	JUNE	JULY	AUG.	SEPT		
Pulp, Paper and Products	195.6	219.0	251.3	252.4	252.2	252.7	247.2	14.7
Pulp, Paper & Products, except Waste Paper ♦	195.6	219.2	251.1	253.4	253.2	253.7	247.7	14.9
Total Wood Pulp	266.5	314.3	388.0	388.6	388.6	390.6	377.4	23.1
Total Paper	206.1	229.6	258.3	258.5	258.5	258.9	254.1	12.6
Total Paper, exc. Newsprint	199.4	222.8	249.9	250.1	250.6	250.7	246.7	12.5
Newsprint	226.3	249.9	283.7	283.7	283.8	283.8	276.7	13.0
Total Paperboard	179.6	202.1	242.7	237.5	238.1	239.2	233.1	17.5
Total Paper and Paperboard ♦	197.8	220.9	253.4	251.9	252.3	252.7	247.5	14.0
Converted Products	186.5	209.9	239.3	242.4	242.0	242.5	236.7	14.5
Waste Paper	191.2	206.6	206.6	194.4	193.8	192.5	214.1	5.2
All Commodities	209.3	235.5	265.2	269.8	273.1	274.1	265.1	14.5
Industrial Commodities	209.4	236.4	273.0	275.6	277.3	278.2	271.4	17.2

(1) - Grade definitions revised by Census as of January 1979. New grades now consistent with API definitions. 1977 and 1978 Census data adjusted by API for comparability with 1979.

* See page 3 for Hard Pressed Board data. ♦ Computed by API P-Preliminary R-Revised

SOURCES: Production - Bureau of Census, U.S. Department of Commerce
Producer Price Indexes -Bureau of Labor Statistics, U.S. Department of Labor

Continued from Page 2

The Fibre Box Association reported a strong increase in the seasonally adjusted rate of fibre box shipments from August to September. The unadjusted shipments total, at 21.1 billion square feet, was 3.6% ahead of its year-ago level and second only to the 22.0 billion square feet shipped in January. FBA data show that the seasonally adjusted trend of fibre box shipments bottomed out in the May-July period at about 18.8 billion square feet per month. The July-September average of 19.6 billion square feet showed a 4.5% recovery.

A major source of strength in the paperboard markets has been the demand for exports. This strength extended to all major furnishes. For the January-September period, paperboard production for export averaged 3.1 million tons per year, 40% over the comparable year-ago rate. Unbleached kraft paperboard, which accounted for 72% of the 1980 total rose 39%. Semi-chemical paperboard, at 8% of the total, rose by 129%. In contrast with the domestic demand, export demand fell sharply from August to September, with the largest tonnage declines in unbleached kraft linerboard. However the September 1980 kraft export tonnage was still 32% ahead of the September 1979 level. Bleached paperboard exports held steady in September, but the nine-month total was only 14% ahead of its year-ago level.

Sales and Earnings

Net sales of 23 paper companies in the third quarter of 1980 amounted to $8.1 billion, 6.9% over the year-ago total. This brought sales for the first three quarters of 1980 to $24.1 billion, 9% above the year-ago total. These same companies reported third quarter 1980 earnings after taxes but before extraordinary gains or losses at $403 million, 11% below the year-ago total. For the entire first three quarters earnings totalled $1.3 billion, which was 9.5% below the total for the first three quarters of 1979.

Sales of these companies accounted for about 55% of the industry total.

Technical Note:

The API Divisions have completed their resurvey of members to obtain the most accurate information on the production or shipments totals. The resultant revisions in monthly data, however, cannot be shown in the production tables of this Monthly Statistical Summary because only four months of data can be shown. In answer to requests for the revised data, the 1978 and 1979 monthly data on production of paper and paperboard for the grades shown in this report are published on page 12. The annual totals are consistent with those to be published in the forthcoming issue of the Statistics of Paper and Paperboard and, of course, with the data published in the annual statistical reports of the various Divisions of the American Paper Institute.

Continued from Page 11

1979

PAPER, PAPERBOARD, CONSTRUCTION AND WET MACHINE GRADES

(Thousands of Short Tons)

PRODUCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC'	SUM
NEWSPRINT PROD	315.4	308.3	347.8	318.8	338.7	337.1	331.8	356.5	337.2	368.1	363.5	338.7	4061.9
#NEWSPRINT SHIP	315.3	306.5	350.1	321.1	336.5	335.1	334.6	354.8	336.3	347.6	361.1	346.9	4065.9
PRINT/WRIT sum	1233.1	1183.4	1362.7	1260.1	1310.6	1286.2	1219.1	1365.2	1241.8	1380.2	1298.6	1226.7	15367.7
GROUNDWOOD	116.9	112.8	128.3	125.6	130.0	127.0	124.4	133.4	122.5	136.1	131.5	120.5	1509.0
#GNDWD NEW ORD	134.3	112.0	143.9	114.5	119.7	129.3	134.0	139.5	128.5	143.1	109.7	110.7	1519.2
#GNDWD UNF ORD	150.0	154.3	167.8	157.8	144.8	146.8	162.3	163.2	174.2	176.9	156.2	149.4	1903.7
COATED	367.2	354.1	409.2	377.2	374.8	353.2	362.2	406.7	364.7	407.2	382.6	367.5	4526.6
#CTD NEW ORD	396.7	343.6	402.0	394.9	373.9	338.8	397.7	401.4	349.1	380.7	402.4	366.1	4547.2
#CTD UNF ORD	363.0	370.6	360.7	381.4	383.4	359.4	412.7	395.0	383.6	358.8	373.9	385.3	4527.6
UNCTD FREE SHEET	618.8	590.8	686.0	632.9	677.8	682.7	612.1	694.8	627.2	701.4	660.2	628.5	7813.2
#UFS NEW ORD	657.7	598.9	687.4	622.5	695.2	677.4	636.8	699.9	629.9	679.4	639.6	601.7	7826.3
#UFS UNF ORD	742.0	785.3	781.8	774.9	787.5	763.7	828.1	813.8	826.5	803.7	791.6	779.7	9478.4
THIN	30.7	29.9	34.6	31.7	34.0	31.6	29.2	32.9	31.4	30.8	31.2	28.1	376.1
COTTON	10.1	9.9	11.9	10.7	11.2	10.1	8.4	10.6	10.3	11.2	10.7	9.5	124.6
BL BRISTOLS	89.4	85.9	92.7	82.0	82.8	81.6	82.8	86.8	85.7	93.5	82.4	72.6	1018.2
TISSUE	356.6	346.7	400.6	377.0	395.6	386.0	371.0	398.7	366.1	392.8	369.9	345.2	4506.2
TOT PKG&OTH sum	451.9	448.2	493.5	481.9	501.7	489.4	455.2	492.3	457.7	504.9	487.1	461.0	5724.8
UBK PKG	314.8	316.6	337.7	336.4	345.5	335.6	318.5	334.5	316.7	345.1	330.2	302.1	3933.7
OTH PAP	137.1	131.6	155.8	145.5	156.2	153.8	136.7	157.8	141.0	159.8	156.9	158.9	1791.1
TOTAL PAPER	2357.0	2286.6	2604.6	2437.8	2546.6	2498.7	2377.1	2612.7	2402.8	2646.0	2519.1	2371.6	29660.6
S.A.	2366.5	2391.8	2420.6	2420.9	2462.9	2449.7	2547.8	2512.2	2505.5	2546.7	2536.9	2536.5	29497.9
SWP P'BD sum	1923.8	1825.3	2090.5	2020.2	2065.9	2036.0	1946.2	2069.2	1935.8	2122.1	2032.4	1770.8	23838.2
UBK LINER	1126.4	1059.7	1194.3	1161.1	1184.2	1191.0	1139.3	1231.7	1144.2	1265.2	1205.8	1048.5	13951.5
#PROD FOR EXPT	124.3	113.8	144.0	133.7	136.2	137.2	138.4	148.0	137.9	146.8	161.4	123.4	1645.2
OTH UBK P'BD	104.9	92.0	122.0	114.5	110.3	108.3	95.3	94.5	87.7	98.4	100.5	71.3	1199.6
SEMICHEM	371.2	346.7	420.6	396.4	416.1	402.1	388.5	405.9	386.6	409.2	390.3	355.5	4689.1
#PROD FOR EXPT	9.2	4.9	11.6	9.0	7.3	8.0	8.9	10.8	7.1	7.7	9.0	4.8	98.1
SOLID BL.	321.3	326.8	353.7	348.2	355.3	334.5	323.1	337.2	317.3	349.4	335.6	295.6	3998.1
#PROD FOR EXPT	29.9	40.1	45.2	38.8	50.6	47.1	36.8	41.2	40.4	43.8	43.4	34.1	491.4
RECYCLED	653.5	604.7	677.9	635.4	671.5	624.7	566.3	661.2	624.8	677.2	632.7	560.8	7590.7
#PROD FOR EXPT	1.5	2.0	1.6	1.6	2.5	1.3	1.0	1.6	1.8	1.6	2.3	3.1	21.8
TOTAL PAPERBD	2577.3	2430.0	[illegible]	2655.6	2737.4	2660.6	2512.5	2730.4	2560.6	2799.3	2665.1	2331.7	31428.9
#CONT BD(D.U.)	1514.4	1433.9	[illegible]	1567.5	1615.0	1596.6	1535.2	1659.2	1547.2	1691.4	1602.7	1436.7	18824.8
#BOX BD (D.U.)	494.0	479.0	518.4	503.4	515.0	480.5	444.2	488.6	462.2	509.1	465.4	416.3	5776.1
#ALL OTH(D.U.)	404.8	356.3	422.6	401.6	410.8	390.0	348.1	381.0	364.0	399.0	380.9	313.3	4571.5
#TOT PRD FR EXPT	164.9	160.8	202.4	183.1	196.6	193.5	185.1	201.6	187.2	199.8	216.1	165.4	2256.5
S.A.	2606.0	2563.3	2589.7	2553.4	2565.5	2590.7	2630.9	2612.9	2701.1	2676.2	2667.8	2733.5	31490.8
WET MACH. BD.	8.8	11.3	12.6	10.0	11.8	11.3	7.4	12.6	12.6	14.8	14.3	15.9	143.6
BLDG PAP.	153.7	149.2	171.5	159.1	173.8	169.6	147.2	167.8	147.8	168.4	154.4	137.4	1899.9
INSUL BD.	119.3	109.3	127.5	122.2	128.1	121.6	106.8	136.6	116.0	130.9	110.7	92.9	1421.9
TOTAL OTHR GDS	281.8	269.8	311.6	291.3	313.7	302.5	261.4	317.0	276.6	314.1	279.4	246.2	3465.4
S.A.	299.3	300.2	294.1	289.3	288.2	287.7	279.9	283.6	285.4	298.6	280.7	280.9	3468.0
TOTAL EX HPB	5216.1	4986.4	5684.6	5384.7	5597.7	5461.8	5151.0	5660.1	5240.0	5759.4	5463.6	4949.5	64554.9
S.A.	5271.7	5255.3	5304.5	[illegible]	5316.5	5328.1	5458.6	5408.7	5492.1	5521.5	5485.3	5550.9	64656.8
HARD PRESSED BD	166.5	154.7	184.7	187.5	187.2	169.1	188.2	194.1	187.4	201.0	165.4	136.9	2122.7
S.A.	180.8	165.8	178.1	174.3	176.9	172.7	182.7	173.6	202.8	179.6	169.6	164.6	2121.6

1978

PRODUCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC'	SUM
NEWSPRINT PROD	318.1	307.4	348.4	329.8	333.4	334.9	248.5	271.6	318.8	326.7	320.7	309.2	3767.5
#NEWSPRINT SHIP	309.4	309.4	355.9	325.3	337.4	338.5	245.5	277.0	316.4	332.3	321.6	310.4	3779.3
PRINT/WRIT sum	1178.0	1151.8	1341.6	1227.1	1299.5	1236.0	1089.8	1239.0	1157.0	1280.2	1240.9	1154.8	14595.6
GROUNDWOOD	113.5	105.2	126.7	120.4	132.6	113.6	92.0	89.0	105.6	119.7	121.2	114.9	1354.4
#GNDWD NEW ORD	130.7	102.5	128.7	121.4	133.1	140.6	83.1	97.5	144.9	114.7	101.4	115.9	1414.4
#GNDWD UNF ORD	160.1	154.2	153.9	147.7	145.4	164.2	156.2	166.3	206.7	199.9	181.1	185.1	2020.6
COATED	372.4	355.9	409.2	363.7	399.4	375.4	328.4	386.9	356.1	391.5	380.4	334.0	4453.3
#CTD NEW ORD	375.0	357.9	425.9	341.9	390.0	381.4	335.1	388.7	345.1	361.5	366.1	364.0	4432.5
#CTD UNF ORD	383.2	399.8	424.2	399.2	396.9	402.9	414.2	414.3	410.9	372.0	360.8	404.1	4782.4
UNCTD FREE SHEET	565.3	570.2	661.9	616.3	633.5	620.4	551.3	630.4	570.3	621.5	602.4	577.8	7221.3
#UFS NEW ORD	585.6	609.3	707.4	659.1	712.3	667.9	579.5	645.3	603.5	613.8	580.4	573.8	7537.9
#UFS UNF ORD	445.6	495.7	542.4	589.5	671.4	701.2	739.2	752.2	802.1	769.5	752.9	753.6	8015.3
THIN	31.1	27.0	33.2	28.0	28.7	28.0	26.8	30.8	28.3	29.5	30.3	28.0	349.7
COTTON	9.4	8.6	11.0	9.5	10.8	9.5	7.5	9.3	9.5	9.8	10.3	9.3	114.4
BL BRISTOLS	86.3	84.9	99.6	89.2	94.5	89.1	83.8	92.6	87.2	108.2	96.3	90.8	1102.5
TISSUE	370.1	341.1	373.8	365.5	389.5	368.4	314.3	335.1	324.8	360.9	343.6	327.6	4214.7
TOT PKG&OTH sum	494.7	468.6	528.4	520.1	535.9	506.1	455.9	442.9	458.0	471.4	463.4	444.0	5789.4
UBK PKG	327.0	313.6	354.1	355.8	356.3	328.8	314.5	299.4	312.5	319.9	305.7	296.4	3884.0
OTH PAP	167.7	155.0	174.3	164.3	179.6	177.3	141.4	143.5	145.5	151.5	157.7	147.6	1905.4
TOTAL PAPER	2360.9	2268.9	2592.2	2442.5	2558.3	2445.4	2108.5	2288.6	2258.6	2439.2	2368.6	2235.6	28367.2
S.A.	2372.7	2380.8	2404.7	2437.6	2479.0	2392.7	2264.8	2200.5	2345.4	2349.9	2385.3	2385.9	28399.3
SWP P'BD sum	1853.5	1751.6	1989.6	1929.5	2047.6	1982.8	1833.7	1973.4	1874.0	1967.3	1934.1	1652.8	22790.1
UBK LINER	1083.3	1018.3	1148.3	1101.9	1181.9	1133.7	1046.0	1153.8	1103.8	1143.4	1153.0	960.4	13227.8
#PROD FOR EXPT	114.7	113.1	120.3	114.4	129.5	122.2	134.3	127.1	139.7	118.3	125.2	107.7	1466.3
OTH UBK P'BD	95.4	90.0	106.0	98.0	117.0	112.2	100.9	105.1	89.2	82.7	77.1	70.9	1144.5
SEMICHEM	354.4	335.8	385.1	384.2	399.8	385.7	355.5	363.4	358.4	393.1	386.1	337.7	4439.2
#PROD FOR EXPT	10.8	8.3	10.1	11.1	11.2	9.3	9.0	11.1	8.5	10.3	12.5	7.1	119.2
SOLID BL.	320.4	307.5	350.2	345.4	348.9	351.2	331.3	351.1	322.6	348.1	317.9	283.8	3978.6
#PROD FOR EXPT	34.3	27.2	40.3	43.7	44.6	42.7	29.3	37.1	31.7	33.8	32.9	32.2	429.8
RECYCLED	616.9	571.7	661.1	650.2	657.7	645.7	559.1	645.2	605.8	666.3	644.3	560.6	7484.6
#PROD FOR EXPT	2.1	1.5	2.0	1.6	2.2	2.2	2.1	1.8	1.6	1.3	1.7	1.6	21.6
TOTAL PAPERBD	2470.4	2323.3	2650.7	2579.7	2705.3	2628.5	2392.8	2618.6	2479.8	2633.6	2578.4	2213.4	30274.7
#CONT BD(D.U.)													17908.2
#BOX BD (D.U.)	MONTHLY DATA NOT AVAILABLE												6504.5
#ALL OTH(D.U.)													3825.4
#TOT PRD FR EXPT	161.9	150.1	172.7	170.8	187.5	176.4	174.6	177.0	181.4	163.7	172.3	148.5	2036.8
S.A.	2513.1	2448.2	2470.4	2499.7	2528.3	2552.0	2524.1	2503.5	2593.9	2527.4	2578.4	2597.9	30336.9
WET MACH. BD.	9.6	10.3	12.2	12.4	13.1	13.3	7.4	12.9	11.7	11.6	10.8	11.0	136.3
BLDG PAP.	145.1	146.1	169.1	171.2	174.3	168.2	147.8	171.4	152.8	166.3	161.9	140.8	1915.0
INSUL BD.	106.9	114.1	126.3	117.0	125.2	107.3	103.4	124.4	119.2	124.4	127.6	120.5	1416.3
TOTAL OTHR GDS	261.6	270.5	307.6	300.6	312.6	288.8	258.6	308.7	283.7	302.3	300.3	272.3	3467.6
S.A.	285.9	301.5	284.5	302.7	286.9	269.4	280.6	277.5	286.7	292.6	301.8	312.2	3482.2
TOTAL EX HPB	5092.9	4862.8	5550.6	5322.8	5576.2	5362.7	4759.9	5215.9	5022.1	5375.1	5247.3	4721.3	62109.5
S.A.	5171.7	5130.5	5159.5	5240.0	5294.2	5214.1	5069.5	4981.5	5226.0	5169.9	5265.5	5296.0	62218.5
HARD PRESSED BD	169.0	185.0	200.1	202.4	206.1	197.7	189.7	220.4	179.8	200.2	178.6	164.7	2293.7
S.A.	186.9	198.3	188.4	190.4	194.3	197.1	189.1	198.2	190.1	182.2	184.3	198.7	2298.0

INDUSTRY FACT SHEET

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

October 24, 1980

	PRODUCTION (000 TONS)					
	Sept 1980	Aug. 1980	Sept 1979	Jan - Sept 1980	Jan - Sept 1979	% Change 80/79
PAPER GRADES	P	R				
Newsprint	370	412	337	3470	2992	16.0
Uncoated Groundwood (s)	123	125	123	1129	1121	0.7
Coated Paper (s)	394	374	365	3450	3369	2.4
Uncoated Free Sheet Paper (s)	622	636	627	5979	5823	2.7
Thin Paper (c)	28	27	31	256	286	-10.3
Cotton Fiber Paper (s)	10	9	10	92	93	-0.9
Bleached Bristols (s)	75	72	86	739	770	-4.0
Tissue Paper	340	346	366	3256	3398	-4.2
Unbleached Kraft Packaging & Indl. Converting (s)	320	306	317	2870	2956	-2.9
Other Paper (c)	135	135	141	1270	1316	-3.5
TOTAL PAPER	2417	2443	2403	22512	22124	1.8
PAPERBOARD GRADES						
Kraft Linerboard, Unbleached	1176	1251	1144	10849	10432	4.0
Other Kraft Paperboard	81	76	88	752	929	-19.1
Semichemical Paperboard	383	387	387	3592	3534	1.6
Bleached Paperboard	313	328	317	2947	3017	-2.3
Recycled Paperboard	571	544	625	5197	5720	-9.1
TOTAL PAPERBOARD	2524	2586	2561	23337	23633	-1.3
CONSTRUCTION & WET MACH GRADES(c)	187	201	277	1843	2626	-29.8
TOTAL PAPER AND PAPERBOARD	5128	5229	5240	47692	48382	-1.4
HARD PRESSED BD.[not in total](c)	135	160	187	1261	1619	-22.1

WOOD PULP (ALL GRADES)	Aug. 1980	July 1980	Aug. 1979	Jan - Aug. 1980	Jan - Aug. 1979	% Change 80/79
Dissolving & Special Alpha	129	111	155	1041	993	4.8
Bleached Sulphite	119	101	119	950	885	7.3
Unbleached Sulphite	31	29	35	259	266	-2.9
Bleached & Semi-Bl. Sulph.	1610	1459	1597	12770	12041	6.1
Unbleached Sulphate	1714	1590	1660	13541	13315	1.7
Semichemical	335	306	352	2728	2706	0.8
Groundwood and Thermo-Mechanical	397	369	380	3038	2914	4.3
TOTAL PULP DIVISION DATA	4334	3965	4299	34327	33121	3.6
Defib. Exploded & Scrngs E	210	188	280	1509	2041	-26.1
TOTAL WOOD PULP PRODUCTION	4544	4153	4579	35835	35161	1.9

Note: Paperboard cumulative totals include revisions not available monthly.

(s) - Shipments R - Revised E - Estimate
P - Preliminary (c) - Census Data - Production, last 2 months estimated.

October 30, 1980

	Full Year		INDUSTRY DATA 1980			Ann. Rate Year - To - Date	% From Same Pd. Last Yr.
			R	R	P		
PAPER AND PAPERBOARD -- Tons (000)	1978	1979	July	August	September		
Total Production (API).......| |...	62109	64555	4811	5229	5128	63589	-1.4
Total Seasonally Adjusted....| excluding |...			5100	5032	5347	63003	-1.8
Imports (including Products).|hard pressed|..E	9117	9123	664	658	670	8912	-1.8
Exports (including Products).| board |..E	3373	3672	483	547	550	5131	43.2
Apparent Consumption.........| |...	67854a	70006b	5281	5143	5467	66784c	-4.1
Paper Production % Tonnage Capacity...........	93.1g	95.2g	79.2	86.0	87.4	92.2gh	-
Paperboard Production % Tonnage Capacity......	92.8g	94.2g	80.7	87.9	87.9	91.0g	-
			June	July	August		
MARKET WOOD PULP PRODUCTION - Tons (000)........	5126	5667	547	542	564	6570	19.0
TOTAL WOOD PULP PRODUCTION - Tons (000)..(f)....	47228	49743	4307	3965	4334	51490	3.6
WOOD PULP IMPORTS - TONS (000)..................	4025	4318	336	285	334	4180	-4.5
WOOD PULP EXPORTS - TONS (000)..................	2599	2935	362	356	385	3875	39.6
RAW MATERIALS CONSUMPTION - Tons (000)							
..PAPER AND BOARD MILLS			June	July	August		
Wood Pulp..(k)...............................	47911	50156	4172	3833	3870	47849	-0.8
Waste Paper....(d)...........................	14760	15400	1109	1034	1157	14247	-1.0
Other (Census)..............................E	778	643	43	42	46	591	-10.3
Total................	63449	66199	5324	4909	5073	64687	-1.1
..WOOD PULP - NON PAPER........................E	884	909	70	61	65	829	-9.6
PULPWOOD CONSUMPTION Cords(000)Amer.Pulpwd. Assn	77290	79566	6969	6356	6719	81297	1.8
EMPLOYMENT (000)			July	August	September		
Paper and Allied Products..........Total......	700.9	706.7	682.3	689.2	688.9	694.9	-1.6
Pulp, Paper and Board Mills........Total.....E	267.4	271.7	269.2	270.5	270.3	270.0	-0.6
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)							
Paper and Allied Products.....................	6.52	7.12	7.97	7.99	8.02	7.73	10.2
Pulp, Paper Mills...........................E	7.44	8.26	9.28	9.31	9.32	8.98	10.7
Paperboard Mills............................E	7.68	8.38	9.46	9.42	9.46	9.14	10.7
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1980 Q1	1980 Q2	1980 Q3		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	3.46	4.88	5.91	6.13	5.84	6.06y	24.2
INDEX OF OUTPUT PER MAN-HOUR (1967=100).........			July	August	September		
|IN PULP, PAPER |...Production Workers.......RS	159.2	164.0	161.6	159.1	169.5	165.0	1.4
|AND BOARD MILLS|...All Employees............RS	153.5	157.9	153.5	151.2	161.2	157.6	0.6
PAPER AND ALLIED PRODUCTS (Million $)			June	July	August		
Industry Shipments (Dept. of Commerce)*.......	57654	66033	5756	5845	5657	69792	6.3
Pulp, Paper and Paperboard*................	25343	30165	2798	2744	2631	32811	10.6
Inventories (End of Period) - Total Industry*.	5875	6779	7598	7442	7372	7372	15.9
Pulp, Paper and Paperboard*................	2006	2321	2656	2670	2681	2681	24.8
			1979 Q4	1980 Q1	1980 Q2		
Sales (Corporations Only, FTC)................	48982	55359	14401	14682	14522	58408	8.9
Earnings (Corporations Only, FTC)............	2598	3724	778	795	803	3196	-10.4
Depreciation (Corporations Only, FTC).........	1726	1896	489	504	510	2028	9.5
Net Worth (Corporations Only, FTC)...........	20794	23206	23206	24002	24469	24469	12.2
PRICE INDEXES (Bureau of Labor Stats)1967=100			July	August	September		
Total Pulp, Paper and Allied Products.........	195.6	219.0	252.4	252.2	252.7	247.2	14.7
Wood Pulp.....................................	266.5	314.3	388.6	388.6	390.6	377.4	23.1
Waste Paper...................................	191.2	206.6	194.4	193.8	192.5	214.1	5.2
Paper...	206.1	229.6	258.5	258.5	258.9	254.1	12.6
Paperboard....................................	179.6	202.1	237.5	238.1	239.2	233.1	17.5
PAPER DEMAND (INDEXED: 1967=100)			July	August	September		
Total Paper Production *.....................	135.6	141.8	138.5	135.0	143.9	142.5	1.4
Paper New Supply *...........................	132.9	137.2	124.0	125.3	132.3	135.3	-0.9
Total End - Use Index *....................	139.5	144.7	143.5	144.2	144.5	144.4	-0.1
Production of Nondurable Goods *...(19%)..	157.0	164.1	154.2	155.5	156.3	159.7	-2.5
Disposable Income (Constant $) *...(23%)..	145.2	148.5	148.2	148.0	148.0	148.0	-0.3
Total Printing and Publishing *...(58%)..	131.5	136.8	138.1	139.0	139.2	138.0	0.9
Trend Factor	----------	----------	--------Not	Available--	----------	----------	----------
PAPERBOARD DEMAND (INDEXED: 1967=100)							
Total Paperboard Production *................	132.9	137.9	131.3	131.1	139.1	134.6	-1.6
Production for Domestic Use	131.1	135.5	121.5	119.6	132.0	128.2	-4.8
Total End - Use Index *....................	147.7	152.0	140.0	140.7	142.0	145.2	-4.6
Production of Consumer Goods *...(60.49%)	149.1	150.6	141.8	141.9	143.2	144.6	-4.3
Production of Equipment *...(6.62%)	132.8	142.2	142.6	142.9	143.3	144.4	2.1
Production of Materials *...(32.89%)	148.3	156.4	136.3	137.9	139.5	146.4	-6.3
Trend Factor	----------	----------	--------Not	Available--	----------	----------	----------
NEWSPRINT MARKETS			June	July	August		
Consumption by Publishers - Tons (000)........	10872	11240	901	838	903	10853	-0.8
Newspaper Pub. and Printing Empl. Total(000)..	407.4	423.0	433.7	431.4	429.1	431.3	2.6
PRINTING AND FINE PAPER MARKETS							
MAGAZINE ADVERTISING PAGES (LNA, Inc.)..........	115090	115879	9308	7278	6950	107150	1.9
WHOLESALERS SALES AND INVENTORIES (Million $)							
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	17586	19721	1732	1803	1815	21458	10.4
Inventories (End of Period)	1482	1695	1803	1767	1717	1717	7.0
Paper Only..............................Sales	13078	14788	1306	1299	1334	15836	8.5
Inventories (End of Period)	1025	1141	1242	1201	1175	1175	11.4
RETAIL TRADE (Million $)			July	August	September		
Total Retail Sales *.........................	799054	884407	78287	78761	80021	928879	6.3
Nondurable Goods Stores Sales *..............	518190	576882	53211	53899	54623	633093	11.7
GENERAL ECONOMIC DATA							
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)*.	146.1	152.5	140.1	141.0	142.4	146.1	-4.2
PRODUCER PRICES(ALL COMMODITIES)(INDX 1967=100).	209.3	235.5	269.8	273.1	274.1	265.1	14.5
CONSUMER PRICES (ALL ITEMS) (INDEX 1967 = 100)..	195.4	217.4	247.8	249.4	251.7	243.7	13.8
			June	July	August		
TOTAL CONSUMER CREDIT OUTSTANDING - (Billion $).	275.6	311.3	301.4	301.8	303.3	303.3	1.2
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$).			1980 Q1	1980 Q2	1980 Q3		
G.N.P. or Expenditure - Current $.............	2127.6	2368.8	2520.8	2521.3	2583.0	2541.7	8.6
G.N.P. OR Expenditure - 1972 $................	1399.2	1431.6	1444.7	1408.6	1412.1	1421.8	-0.5

lb/capita	Popul.(mil)
.a - 621	218.7
.b - 635	220.6
.c - 600	222.5

.d - 1977 - 12103; 1978 - 12481
. 1979 12956;Ja-Jl'80A.R.12536
. (000 tons) as pub. by Census
.E - Last month estimated by API

f - Wood Pulp Production excludes estimates for def. expl. & scrngs. Prod. was: 1978 - 3,140; 1979 - 3,010; 1980 A.R.Y-T-D 2,264 (000 tons)
g - Adjusted for holiday shutdowns
h - Adjusted to conform with API Division data
k - Excludes consumption of defib. & expl. pulp for hard p. bd.: '78 - 1,666; '79 - 1,593 (000 tons)

N.A. - Not Available
P - Preliminary
Q - Quarter
R - Revised
RS - Revised Series
y - Full year estimated by U.S. Dept. of Commerce
* - Seasonally adjusted